

# Oregon ACCESS (OA) Ticklers

## Quick Reference Guide (QRG)

**Purpose:** Ticklers are reminder messages in OA.

For example, case managers can use ticklers to set up a reminder to schedule an assessment or keep track of a due date for a pended document.

**There two types of ticklers:**

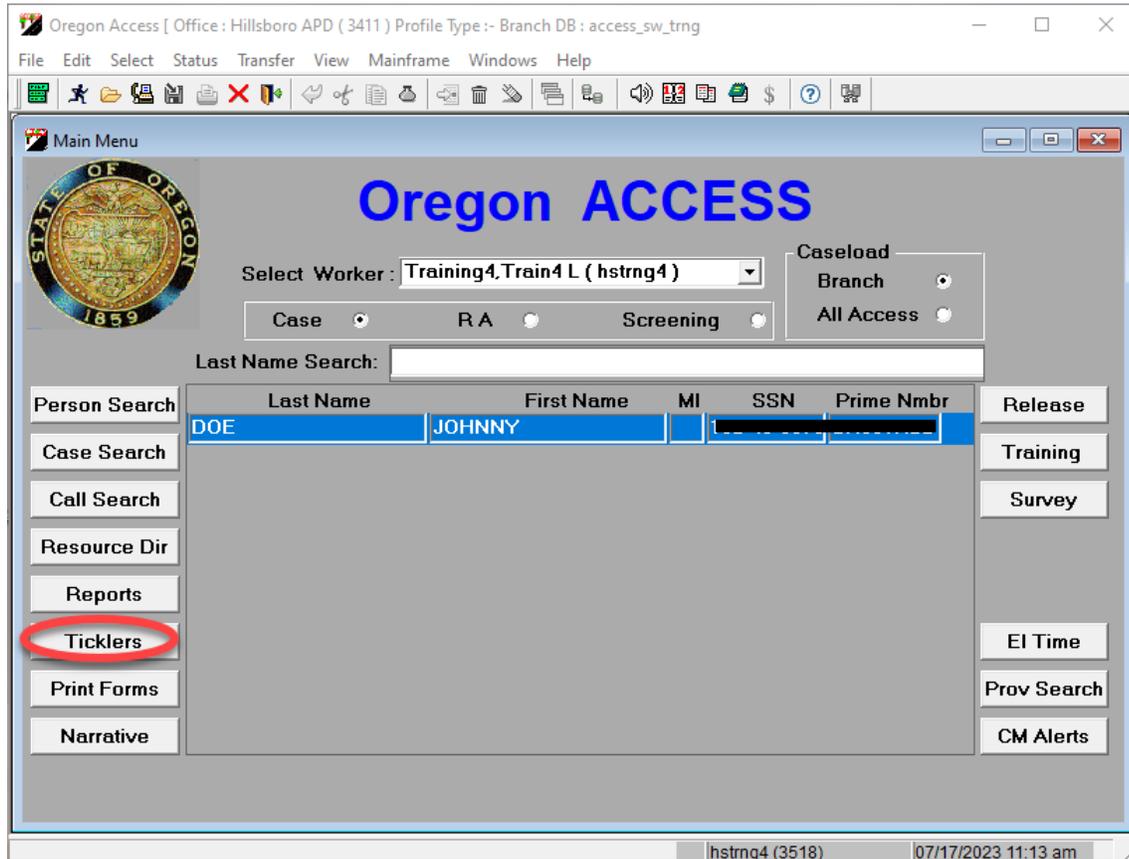
1. General
2. Case related/custom

**General ticklers:** Access them from the Main Menu screen.

These ticklers will appear for the following reasons:

<b>Narrative changes</b> Another worker adds a narration entry on a case assigned to you.	<b>New Case Assignment</b> You are assigned a new case.
<b>Changes to risk elements</b> Services case manager makes changes or updates to the risk assessment in the Client Details section.	<b>Person Turning 65</b> An individual is close to turning age 65.

Once logged into OA, if you have assigned ticklers, you will see them here.



Tickler button on home screen will notify you of status based on color.

**Red:** New ticklers that have not been viewed

**Black:** Ticklers have been viewed but not deleted

**Grey:** No ticklers

**Case related/custom ticklers:** Ticklers you created for yourself. Can be linked to a specific case.

**Process:** Go to **Select>Ticklers>Custom Tickler**.

Select **Custom** as the type of tickler from the dropdown.

Oregon Access [ Office : Hillsboro APD ( 3411 ) Profile Type :- Branch DB : access\_sw\_trng ]

File Edit **Select** Status Transfer View Mainframe Windows Help

Ticklers

Select a Tickler Type : All

Select a Worker : Training9.Train9 S ( hstrng9 )

Alert Date	Last Name	First Name	SSN	Tickler Type
07/31/2023	TUFSS	TONI	[REDACTED]	New case assignment
07/31/2023	WOODS	PHIL	[REDACTED]	New case assignment
07/26/2023	ORANGE	NIKKI	[REDACTED]	New case assignment
07/25/2023	TUFSS	TONI	[REDACTED]	Narrative changes
07/17/2023	TUFSS	TONI	[REDACTED]	New case assignment

Delete Selected Tickler(s)

hstrng4 (3518) 07/17/2023 11:13 am

## Example 1: Custom tickler, case linked.

The screenshot shows the 'Custom Tickler' form in Oregon Access. The 'Worker' field is set to 'Training9.Train9 S ( hstrnc )'. The 'Link to an Case' checkbox is checked and highlighted with a red box. The 'Case' dropdown menu is set to 'TUFSS . TONI' and is also highlighted with a red box. The 'Date Created' is 07/31/2023, 'Description' is 'Schedule Reassess', and 'Alert Date' is 08/30/2023. The 'Created By' is hstrng4. The 'Message' field contains 'Call Toni to schedule reassessment for 9/15/23'. The 'Sort by' options are 'Alert Date', 'Alphabet', and 'Worker'. The table below the form is empty.

Tickler Created for	Description	Date Created	Alert Date
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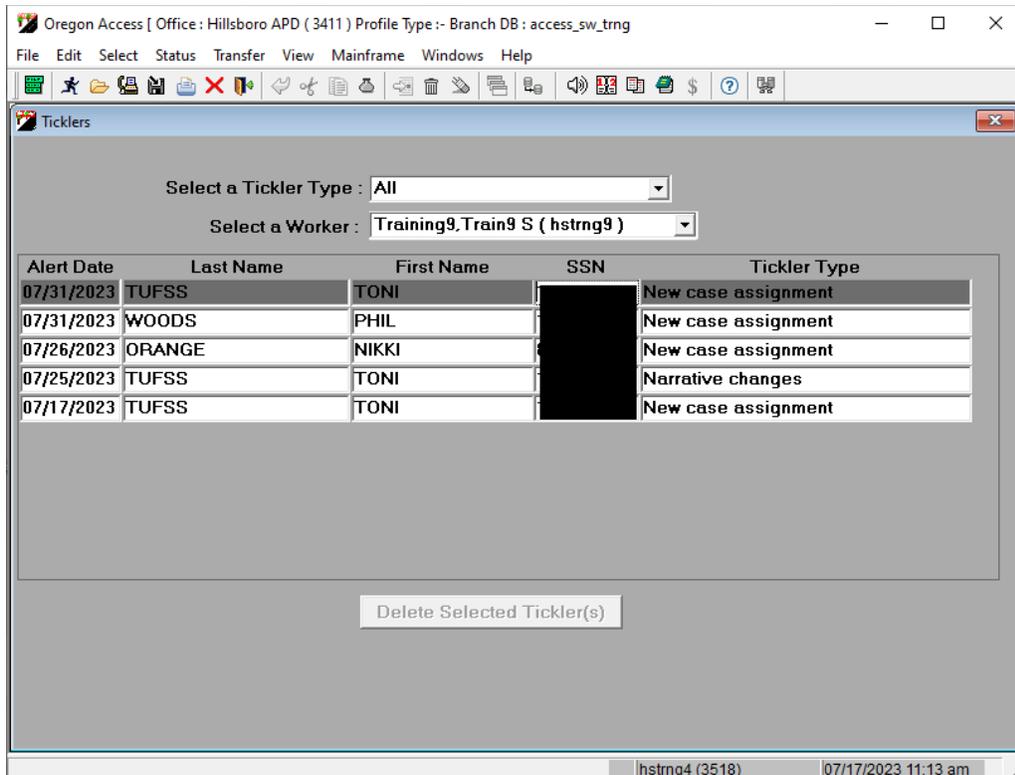
## Example 2: General tickler, case not linked.

The screenshot shows the 'Custom Tickler' form in Oregon Access. The 'Worker' field is set to 'Training9.Train9 S ( hstrnc )'. The 'Link to an Case' checkbox is unchecked and highlighted with a red box. The 'Case' dropdown menu is empty. The 'Date Created' is 07/31/2023, 'Description' is 'Reminder to check', and 'Alert Date' is 08/02/2023. The 'Created By' is hstrng4. The 'Message' field contains 'Look up new cases and applications'. The 'Sort by' options are 'Alert Date', 'Alphabet', and 'Worker'. The table below the form is empty.

Tickler Created for	Description	Date Created	Alert Date
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The example below is a list of ticklers generated for Training9 (worker).

If a tickler is viewed, the row will turn grey.



## Reminders:

- Delete tickler once reviewed and taken appropriate action.
- Custom ticklers associated with a case must be deleted prior to transferring a case.
- Staff may also enter an “Alert Date” for the date they would like the tickler to trigger the red tickler indicator on their OA home page.
- Customer ticklers may be entered for another worker and will appear on their list of ticklers and not yours.

## Questions regarding this QRG?

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