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:

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

Oregon Department of Human Services

Once logged into OA, if you have assigned ticklers, you will see them here.
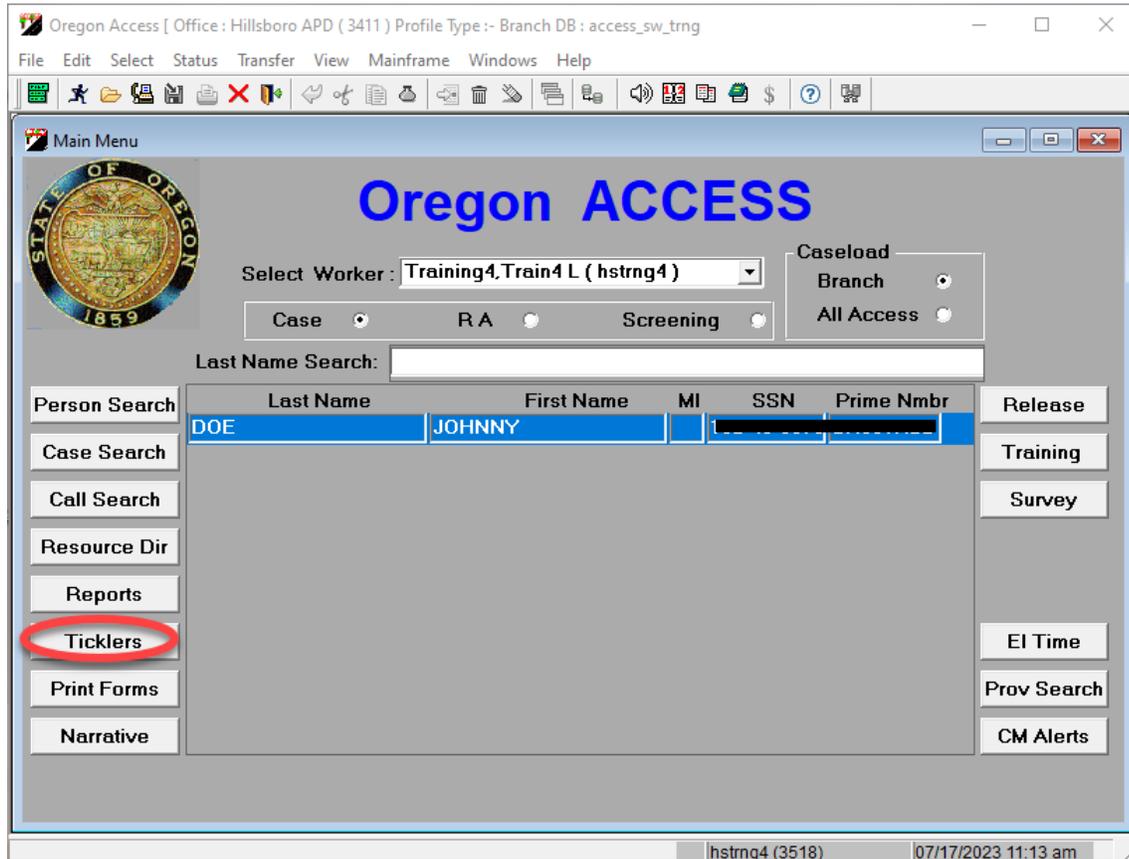
Tickler button on home screen will notify you of status based on color.

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.

Example 1: Custom tickler, case linked.

Example 2: General tickler, case not linked.

The example below is a list of ticklers generated for Training9 (worker).

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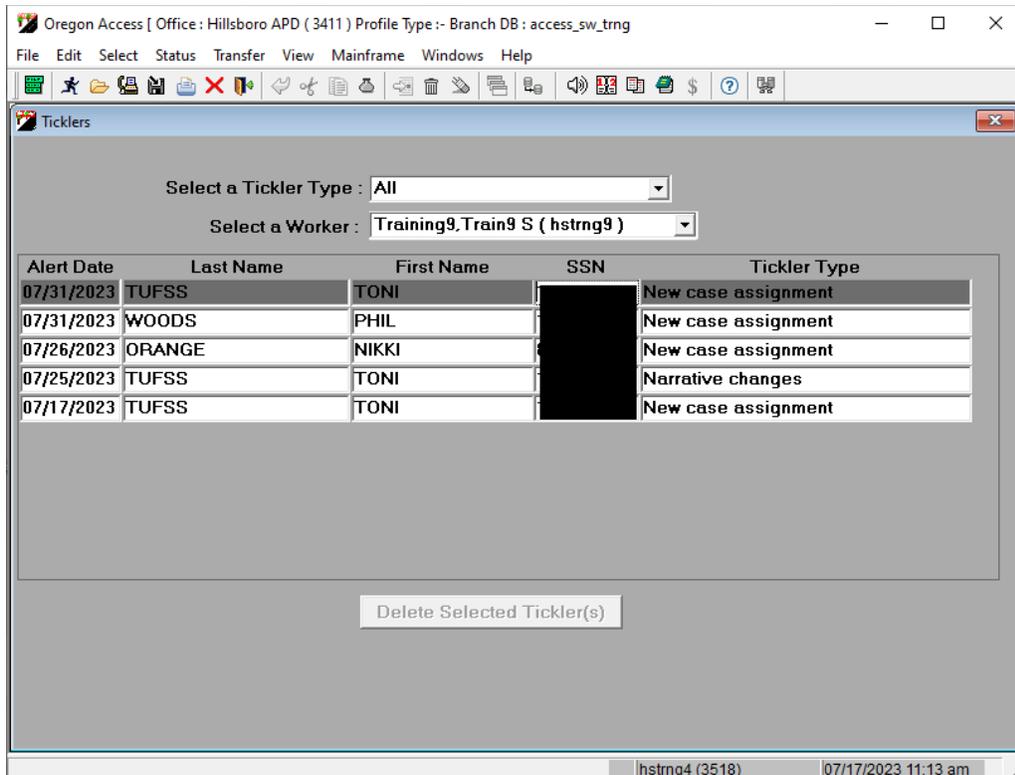
Reminders:

- 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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