

Tickler File

Some service coordinators find it helpful to use a tickler file system to keep track of all the children/families they work with and when the next meeting/activity is due. This system takes time to set up if the service coordinator has a full case load but it is easy to maintain once the initial work is done. Most service coordinators who use a tickler system find it works for them.

Setting up a Tickler File System:

A tickler system can be set up in a recipe card box with index cards or in a three ring binder.

- Each section of the recipe box or three ring binder should be divided by months (January thru December)
- Each child/family will have an index card or sheet of paper for the three ring binder that documents the following:
 - Child's name/date of birth
 - Meeting dates: initial IFSP meeting date, 6 month review meeting due date, annual review meeting due date
 - School transition activities: date referral to the local education agency is due, transition meeting due date
 - Case closure activities: exit IFSP meeting due date, obtain discharge reports, closing letter/close case
- When the service coordinator completes the initial IFSP meeting with the family they fill out the due dates for future activities and will place the information card to the next month that something is due.
- Each month the service coordinator will review the tickler file to refresh their memory on what activities are due in the coming months.
- Service coordinators may choose to use this system in conjunction with one of the other checklists that have also been provided as a resource (daily/weekly checklist, monthly checklist, and/or meeting checklist).
- Service coordinators may choose to use a color coding system on their lists by color coding the different types of activities they engage in with families (i.e. IFSP meetings could be highlighted in blue, 6 month reviews highlighted in orange, transition meetings highlighted in green, etc.).

Sample Information Card for Tickler File

Child's Name: _____

D.O.B. _____

Initial IFSP: _____

6 Month Review Due: _____

Annual IFSP Due: _____

Transition Packet to Family (by 24-26 months): _____

Referral to School District Due (by 30 months): _____

Transition Meeting Due (by 33 months): _____

Exit IFSP Meeting Due (w/in 120 days of exit): _____

Request D/C Reports/Closure Letter Due: _____

3rd Birthday/Close Case: _____