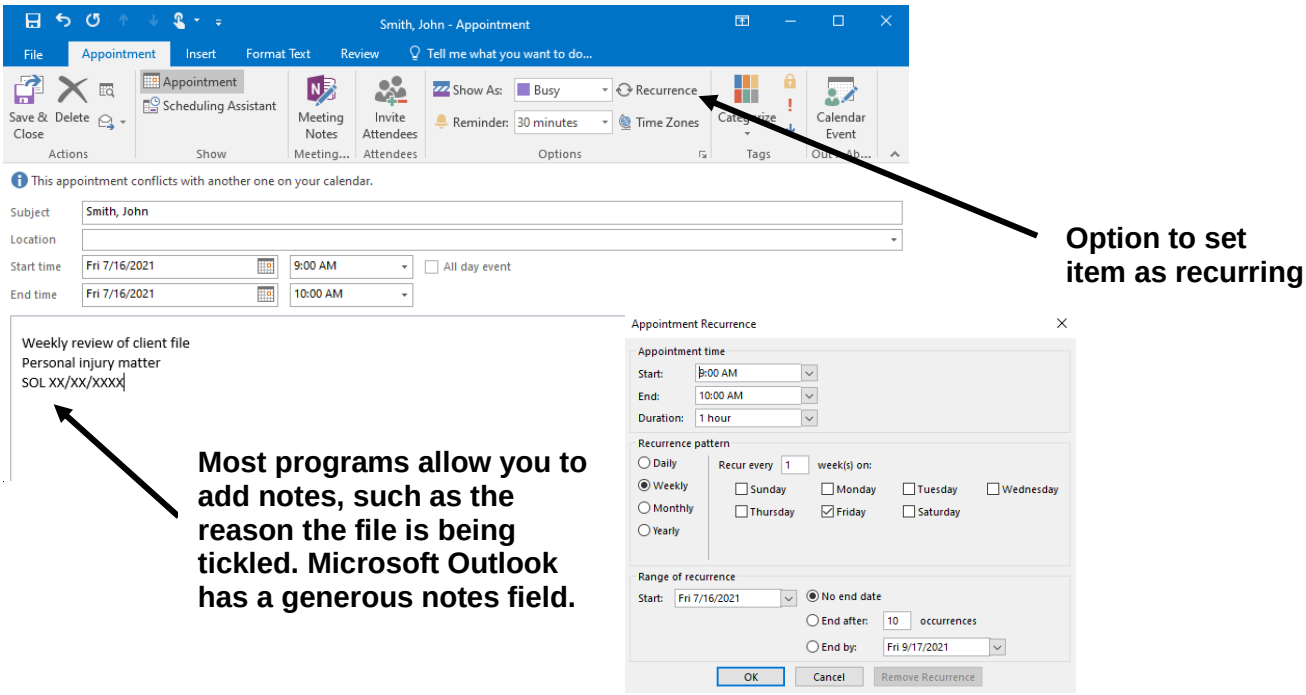
REMINDER AND TICKLER SYSTEMS

No file should ever be set aside without a reminder date on it or be tickled for more than 60 days, unless it is a corporation and only annual meetings need to be noted. It is best to review all files at least once in any 30-day period, ideally during a weekly file review meeting. If the attorney working on the file does not indicate a reminder date, the assistant should check with the attorney to determine when the file should next be reviewed.

A simple system for a sole practitioner with a limited number of files is to keep a list of all open files. This list should be generated on the first day of each month. Keep it readily available on your desk or on your computer. As work is performed on a file or the file is reviewed during the month, that file is crossed off the list. On the last day of the month, a quick review of the list will indicate which files were not seen during the month. You can then pull these files for review.

You can set reminder or tickle dates for each of your files by using recurring appointments or tasks. In most cases, the screen to create a new appointment or task will have an option to set that item as recurring. If you are using recurring appointments or tasks to tickle files, choose a recurrence pattern that falls on a work day (i.e., the fourth Friday of the month) instead of a specific date, which may fall on a weekend or holiday in the future.

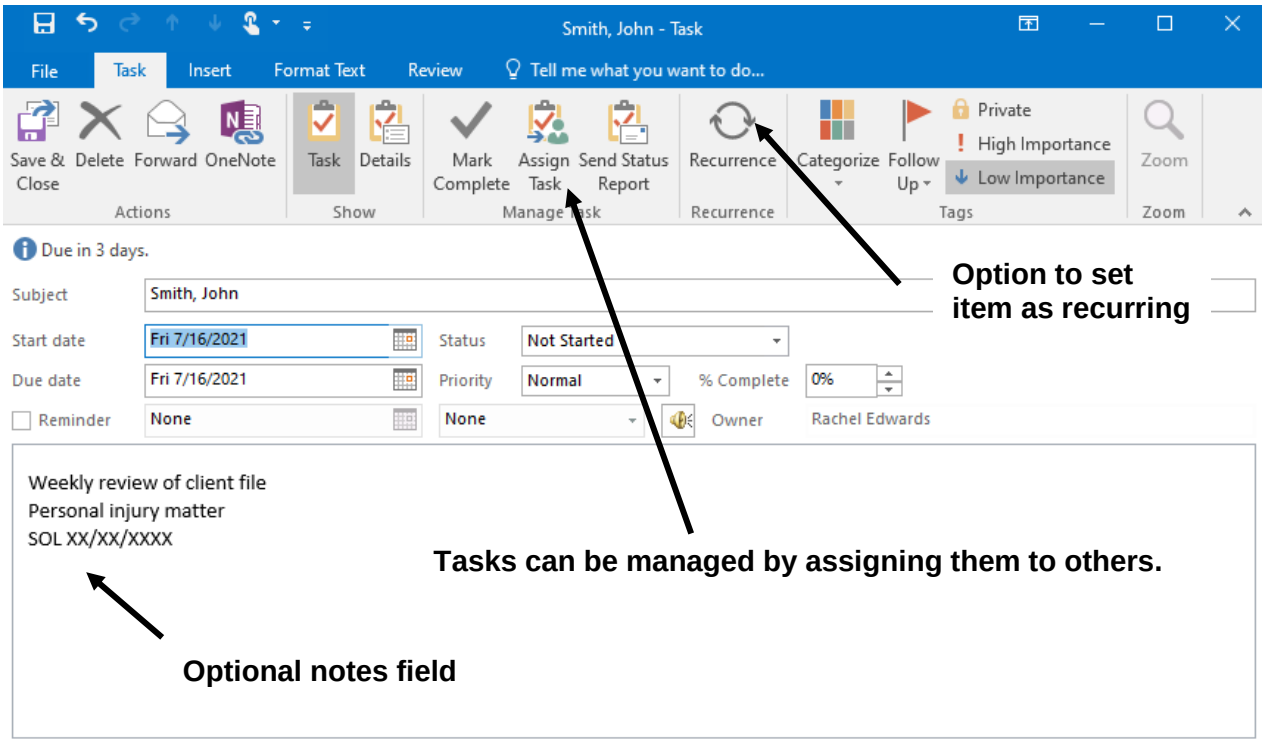
For example, if you are using Microsoft Outlook for your calendaring system, there are two ways to set up a file tickler: recurring appointments or recurring tasks. Here is an example of a recurring appointment set in Microsoft Outlook:



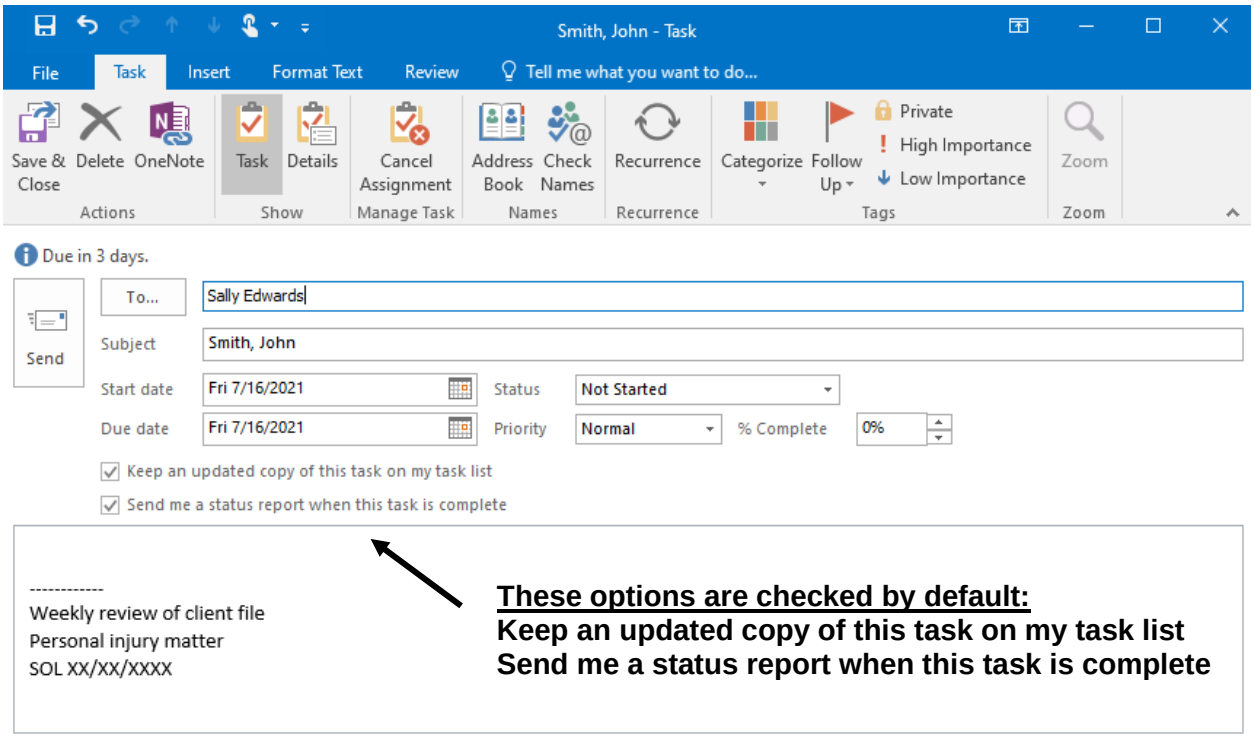
Option to set item as recurring

Most programs allow you to add notes, such as the reason the file is being tickled. Microsoft Outlook has a generous notes field.

Alternatively, you can set up a file tickler in Outlook using recurring tasks:



Here is an example of an assigned task in Microsoft Outlook (sent as an email):



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When file reminders are set as recurring tasks, they are added to your “Tasks and To-Do” List in Microsoft Outlook. This keeps your calendar free for appointments, court dates, and other scheduled events.

Each morning you or your assistant should pull all files tickled for that day. If, after reviewing the file, you determine there is nothing to be done at that time, the file is re-tickled to another future date. NO FILE SHOULD EVER BE SET ASIDE WITHOUT A FUTURE REMINDER DATE. If the file is tickled for a specific task to be performed, it should be accomplished that day. If there is no immediate deadline and you are unable to perform the task that day, tickle the file one to three days later when you will have time to complete the task. Be realistic about what tasks you can complete, and use your reminder system to make sure items you cannot complete today will come across your desk in a day or two when they can be completed.

A good tickler system will alleviate the need to keep files stacked on your desk when they are not being worked on, or the need to set aside an entire day reviewing every open file. A reminder system also prevents files from falling through the cracks because nothing has happened to create any activity on the file.

IMPORTANT NOTICES

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