

User Reminders/Alerts

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Related Documents

SSIS Alerts and Reminders Definitions Job Aid

http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_049990

Enhanced Grid CBT Course

<http://www.dhs.state.mn.us/ssis/cbt2/>

Reminders and Alerts Overview

The SSIS application generates Reminders and Alerts which help workers accomplish time-critical tasks. Workers may also set their own Reminders.

Reminders and Alerts are generated for Primary workers only, except for the assignment of a Secondary worker.

New Reminders and Alerts display in a dialog box when a worker logs onto the SSIS application. The SSIS application also checks every five minutes for new Reminders.

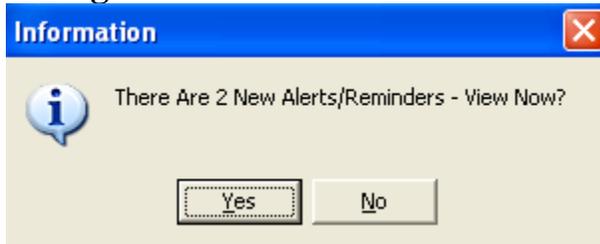
Workers can create a New Reminder at any time. Alerts are generated only for workgroups without close dates and for placements without end dates. Closed workgroups and placements with an end date do not generate Alerts.

Alerts cannot be deleted by workers. The Alert is automatically deleted after the required Message is completed before or by the Due Date.

Reminders and Alerts Step-by-Step Navigation

Access Reminders and Alerts

Access Reminders/Alerts from a Dialog Box

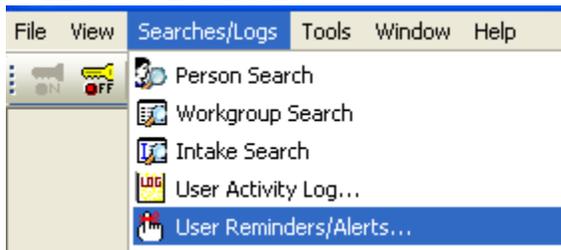


Accessing Reminders/Alerts from a Dialog Box:



1. Click **Yes**.
2. View Reminders and Alerts.

Access Reminders/Alerts from the Windows Toolbar



Accessing Reminders/Alerts from the Windows Toolbar:



1. Click on **Searches/Logs**.
2. Select **User Reminders/Alerts**.
3. View Reminders/Alerts.

Access Reminders/Alerts from the Application Toolbar



Accessing Reminders/Alerts from the Application Toolbar:



1. Click on the **User Reminders/Alerts** command button.
2. View Reminders/Alerts.

Reminders and Alerts Log

The screenshot shows the 'Reminders and Alerts Log' window. At the top, there are checkboxes for 'SSIS Alerts', 'SSIS Reminders', 'User Reminders', and 'Future Reminders'. A 'Refresh' button is on the right. Below is a table with columns: New, Type, Alert Type, Due Date, Message, Workgroup, Tickler ID#, Type ID, and Client Name. The table contains several rows of data, with one row highlighted in blue.

New	Type	Alert Type	Due Date	Message	Workgroup	Tickler ID#	Type ID	Client Name
<input type="checkbox"/>		SSIS Reminder	08/20/2007	New assignment received.	Schmidt Anna CP Assessment 07/01/2007	102950679	2001	
<input type="checkbox"/>		SSIS Reminder	08/17/2007	New assignment received.	Boyer Anna CW Assessment 08/17/2007	102947441	2001	
<input type="checkbox"/>		SSIS Alert	08/16/2007	Family Assessment Conclusion is due by 08/16/2007.	Schmidt Anna CP Assessment 07/01/2007	102951723	1003	
<input type="checkbox"/>		SSIS Alert	06/21/2007	Family Assessment Conclusion is due by 06/21/2007.	Boyer Anna CP Assessment 05/07/2007	102951673	1003	
<input type="checkbox"/>		SSIS Alert	06/16/2007	Family Investigation Determination is due by 06/16/2007.	Boyer Anna CP Assessment 05/01/2007	102951672	1003	
<input type="checkbox"/>		SSIS Alert	04/22/2007	Family Assessment Conclusion is due by 04/22/2007.	Boyer Anna CP Assessment 03/07/2007	102951671	1003	
<input type="checkbox"/>		SSIS Alert	03/15/2007	Family Assessment Conclusion is due by 03/15/2007.	Boyer Anna CP Assessment 01/29/2007	102951649	1003	
<input type="checkbox"/>		SSIS Alert	03/10/2007	Family Assessment Conclusion is due by 03/10/2007.	Boyer Anna CP Assessment 01/24/2007	102951648	1003	

At the bottom of the window, there is an 'Action' dropdown menu and a 'Close' button.

Selecting Filters:



1. Select the **SSIS Alerts** check box to display all Alerts.
2. Select the **SSIS Reminders** check box to display all Reminders.
3. Select the **User Reminders** check box to display all User Reminders.
4. Select the **Future Reminders** check box to display all Future Reminders.

Open Workgroup:



1. Select the line in the grid with the applicable Reminder or Alert.
2. Click the **Action** button.
3. Select **Open Workgroup**.
4. Complete the task and close the workgroup.

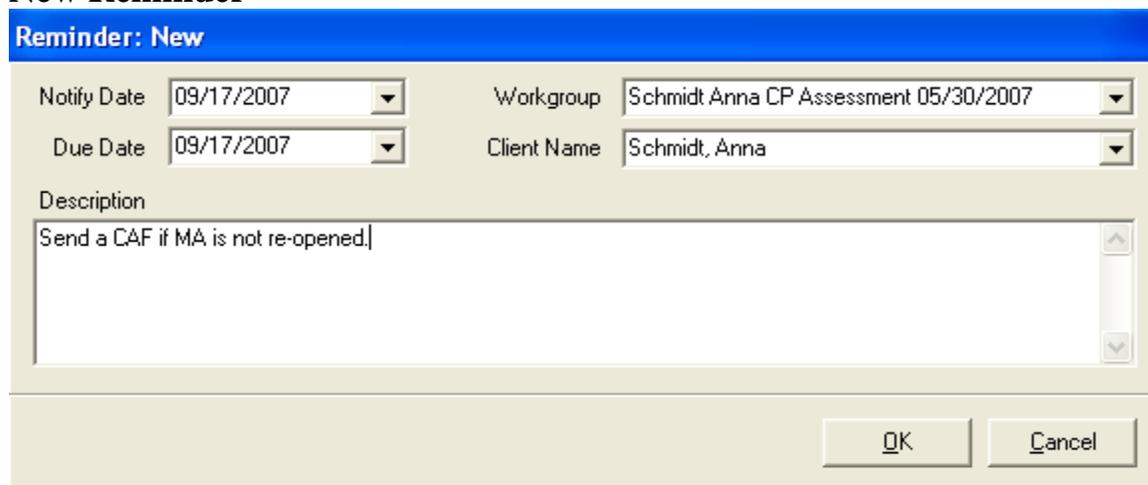
Print Grid:



1. Click the **Action** button.
2. Select **Print Grid**.
3. Click the **Print** button on the Print Preview toolbar.
4. Click the button to close the Print Preview.

New Reminder

New Reminder



Reminder: New

Notify Date: 09/17/2007 Workgroup: Schmidt Anna CP Assessment 05/30/2007

Due Date: 09/17/2007 Client Name: Schmidt, Anna

Description:
Send a CAF if MA is not re-opened.

OK Cancel

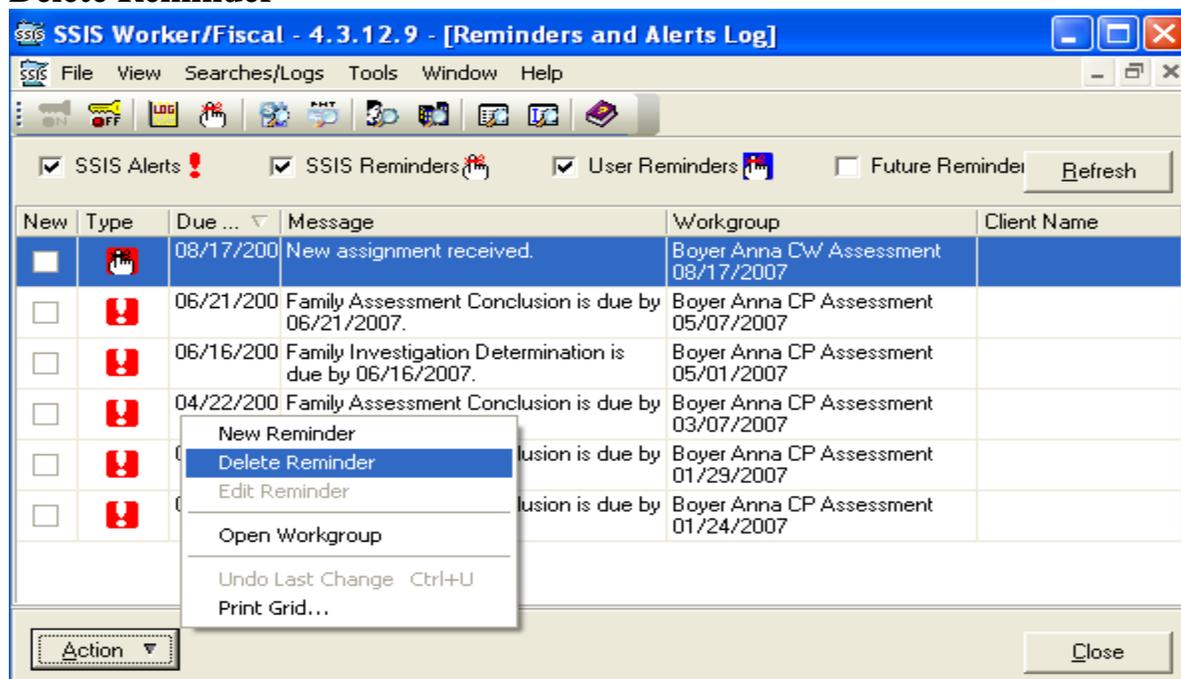
New Reminder:



1. Click the **Action** button.
2. Select **New Reminder**.
3. Complete the New Reminder.

Delete Reminder

Delete Reminder



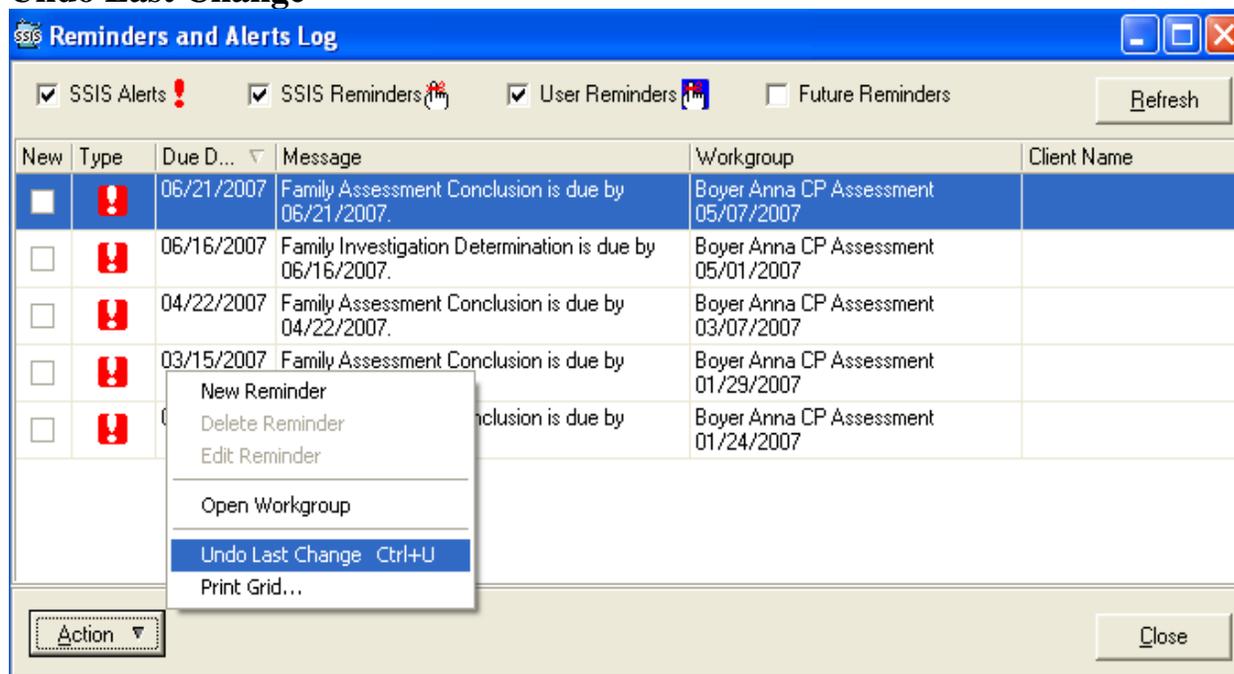
Delete Reminder:



1. Select the applicable Reminder(s) in the grid.
2. Click the **Action** button.
3. Select **Delete Reminder**.

Undo Last Change

Undo Last Change



Undo Last Change:



1. Select the applicable Reminder in the grid.
2. Click the **Action** button.
3. Select **Undo Last Change**.

Reminders and Alerts Complete Navigation

Introduction

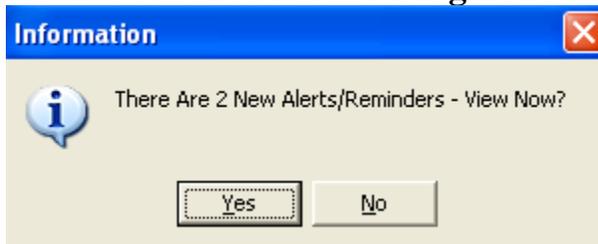
- Alerts are only generated by the SSIS system in three ways:
 - Triggering events in the application
 - Triggering events in the Oracle tables
 - Triggering events on the application server
- The SSIS application allows workers to create user defined Reminders and to view Alerts triggered by the SSIS application, tables, or server
- Workers can delete Reminders but not Alerts
- Satisfying the conditions that triggered an Alert, by the Due Date, deletes the Alert from the Reminders and Alerts Log
- Satisfying the conditions that triggered an Alert, after the Due Date, does not delete the Alert from the Reminders and Alerts Log
- Alerts conform to federal SACWIS funding requirements
- Alerts and Reminders are accessed by any one of three ways:
 - From an Information dialog box
 - From the Windows toolbar
 - From the User Reminders/Alerts quick access button on the Application toolbar.

Reminders and Alerts Dialog Box

Assigning a Workgroup Triggers a Reminder



Reminders and Alerts Dialog Box



When workers log onto the SSIS Worker application they receive Information dialog box messages if they have new Reminders or Alerts.



Hint: The SSIS Worker application updates every five minutes with New Reminders/Alerts.

Reminders and Alerts Log

New	Type	Alert Type	Due Date	Message	Workgroup	Tickler ID#	Type ID	Client Name
<input type="checkbox"/>		User Reminder	12/17/2007	Staffing @ 10:00 in L4140		193239072	1	
<input checked="" type="checkbox"/>		SSIS Reminder	08/20/2007	New assignment received.	Schmidt Anna CW Case Management 08/20/2007	102950678	2001	
<input checked="" type="checkbox"/>		SSIS Reminder	08/20/2007	New assignment received.	Schmidt Anna CP Assessment 07/01/2007	102950679	2001	
<input type="checkbox"/>		SSIS Reminder	08/17/2007	New assignment received.	Boyer Anna CW Assessment 08/17/2007	102947441	2001	
<input type="checkbox"/>		SSIS Alert	06/21/2007	Family Assessment Conclusion is due by 06/21/2007.	Boyer Anna CP Assessment 05/07/2007	102950056	1003	
<input type="checkbox"/>		SSIS Alert	06/16/2007	Family Investigation Determination is due by 06/16/2007.	Boyer Anna CP Assessment 05/01/2007	102950055	1003	

The Reminders and Alerts Log displays four check box filters:

- SSIS Alerts
- SSIS Reminders
- User Reminders
- Future Reminders.

The grid columns are:

- New – displays with a check mark the first time it is viewed
- Type – displays a glyph indicator specific for each Alert Type
- Due Date
- Message
- Workgroup
- Tickler ID# - system generated number identifying each Reminder/Alert
- Type ID – a system generated tickler type number identifying each Reminder/Alert type
- Client Name.

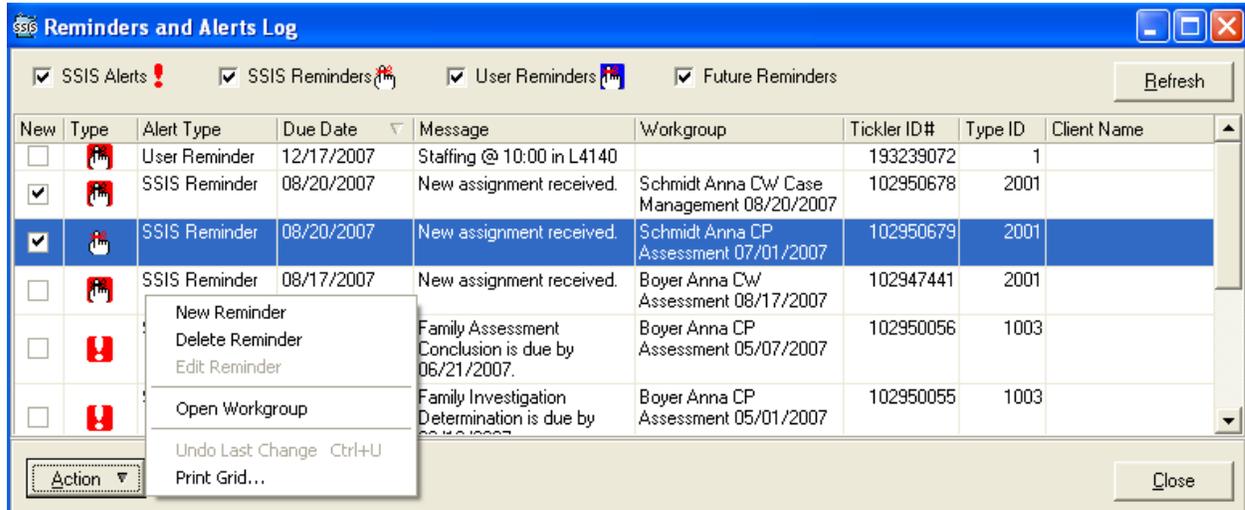
Customize Grid

The screenshot shows the 'Reminders and Alerts Log' window. At the top, there are four filter checkboxes: 'SSIS Alerts' (checked), 'SSIS Reminders' (checked), 'User Reminders' (checked), and 'Future Reminders' (unchecked). A 'Refresh' button is on the right. Below the filters is a table with the following columns: New, Type, Alert Type, Due Date, Message, Workgroup, Tickler ID#, Type ID, and Client Name. The table contains several rows of data, including reminders and alerts. A context menu is open over the second row, showing options like 'Print Grid...', 'Choose Columns...', 'Show Group Panel', 'Auto Filter', 'Restore Grid Defaults', 'Restore Grid Print Settings', and 'Export Grid...'. A 'Customize' dialog box is also open, partially overlapping the table.

New	Type	Alert Type	Due Date	Message	Workgroup	Tickler ID#	Type ID	Client Name
<input checked="" type="checkbox"/>		SSIS Reminder	08/20/2007	New assignment received.	Schmidt Anna CW Case Management 08/20/2007	102950678	2001	
<input type="checkbox"/>		SSIS Reminder	08/20/2007	New assignment received.	Schmidt Anna CP Assessment 07/01/2007	102950679		
<input type="checkbox"/>		SSIS Reminder	08/17/2007	New assignment received.	Boyer Anna CW Assessment 08/17/2007	102947441		
<input type="checkbox"/>		SSIS Alert	08/16/2007	Family Assessment Conclusion is due by 08/16/2007.	Schmidt Anna CP Assessment 07/01/2007	102951723		
<input type="checkbox"/>		SSIS Alert	06/21/2007	Family Assessment Conclusion is due by 06/21/2007.	Boyer Anna CP Assessment 05/07/2007	102951673		
<input type="checkbox"/>		SSIS Alert	06/16/2007	Family Investigation Determination is due by 06/16/2007.	Boyer Anna CP Assessment 05/01/2007	102951672		
<input type="checkbox"/>		SSIS Alert	04/22/2007	Family Assessment Conclusion is due by 04/22/2007.	Boyer Anna CP Assessment 03/07/2007	102951671		
<input type="checkbox"/>		SSIS Alert	03/15/2007	Family Assessment Conclusion is due by 03/15/2007.	Boyer Anna CP Assessment 01/29/2007	102951649		
<input type="checkbox"/>		SSIS Alert	03/10/2007	Family Assessment Conclusion is due by 03/10/2007.	Boyer Anna CP Assessment 01/24/2007	102951648		

The grid can be customized, arranged and sorted like any standard enhanced grid in SSIS.

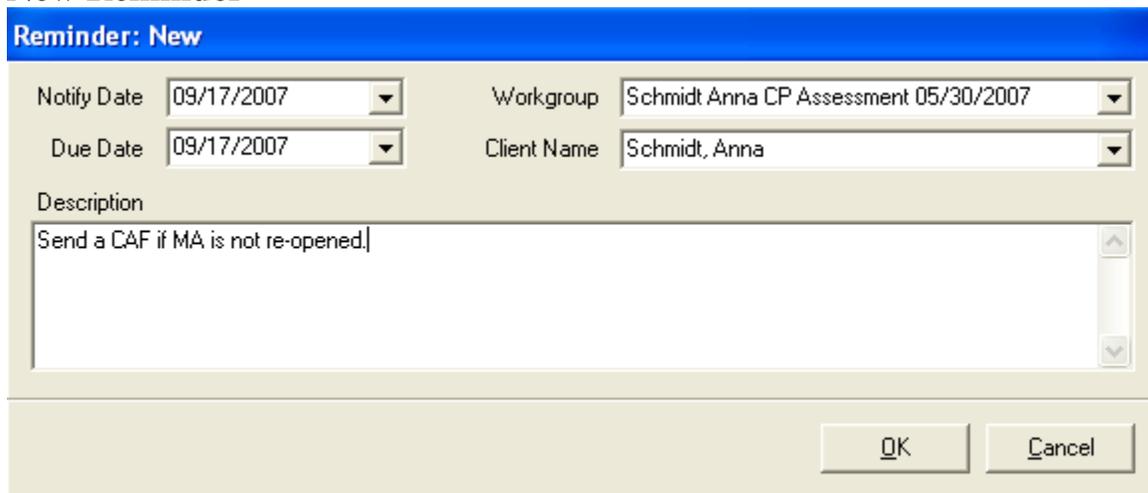
Action Menu



The Action menu includes:

- New Reminder
- Delete Reminder
- Edit Reminder
- Open Workgroup
- Undo Last Change
- Print Grid.

New Reminder



New Reminders are created by either of two methods:

- From the File button on the Windows toolbar
- From the Action button on the Reminders and Alerts Log.

The fields in the Reminder: New window include:

- Notify Date (Date a Reminder first displays on the Reminders and Alerts log)
- Due Date (Completion date for the Reminder)
- Workgroup (If applicable, select a workgroup from the drop-down list)
- Client Name (If applicable, select a Client name from the drop-down list)
- Description (If applicable, enter a descriptive narrative)
- OK button to Save and continue
- Cancel button to cancel the Reminder.

Generate Reminders

Reminders generate when:

- A New Assignment is received
- A Case Note is added by another worker
- A Contact is added by another worker
- A change is made to a License Status
- A request for Statewide Case Access is generated
- A request for Statewide Case Access is approved, denied, or cancelled.

Alert Categories

The three Alert categories are:

- Eligibility
- Child Maltreatment
- Child Placement
- Adult Maltreatment.

SSIS Reminders and Alerts Definitions

Alert/Reminder Text	Triggering Event (Date)	Satisfied By	Due Date	Notify Date
Reminders				
New assignment received	When a worker is associated with an entry on the Assignment Log	Reminder deleted by the worker	Immediate	N/A
Workgroup Updated Case notes added by <worker name> in workgroup	Reminder to primary worker when any change is made to case notes by another worker	Reminder deleted by the worker	Immediate	N/A
Contact added by <worker> name in workgroup	Reminder to primary worker when a contact/activity note is made by another worker	Reminder deleted by the worker	Immediate	N/A
License Status Changed <Provider name> license status changed. Evaluate conditions for any child placed there	When license status is changed on a provider edit screen	Reminder deleted by the worker	Immediate	N/A
Access requested to Workgroup # <workgroup ID> for <client name> with SWNDX # <swndx ID> in <remote county name> County	Generated at time of request	Reminder deleted by the worker	Immediate	N/A
Access requested to workgroup <workgroup ID> by <worker name> in <remote county name> County	Generated at time of request	Access approval or Access denial	Immediate	N/A

Alert/Reminder Text	Triggering Event (Date)	Satisfied By	Due Date	Notify Date
Reminders				
<p>Access granted to workgroup <workgroup ID> for client <client name> with SWNDX # <swndx ID> by <worker name> in <remote county name> County. User ID = <user ID></p> <p>OR</p> <p>Access denied to workgroup <workgroup ID> for client <client name> in <remote county name> County</p> <p>OR</p> <p>Access cancelled to workgroup <workgroup ID> for client <client name> with SWNDX # <swndx ID> by <worker name> in <remote county name> County</p>	<p>Generated at time of approval or denial</p>	<p>Reminder deleted by the worker</p>	<p>Immediate</p>	<p>N/A</p>

Alert/Reminder Text	Triggering Event (Date)	Satisfied By	Due Date	Notify Date
Alerts Note: Alerts apply only to open workgroups and to the primary workers				
Eligibility (IV-E)				
<p>Guy has a PR for this pending</p> <p>Maxis IV-E eligibility review for <child name> is scheduled for <date></p>	<p>Guy translate</p> <p>today's date <= 60 days before di_child_elig.next_maxis_rvw_dt from the most recent di_child_elig record</p> <p>AND</p> <p>di_child_elig.elig_end_dt from the most recent di_child_elig record = NULL</p> <p>AND</p> <p>an open continuous placement</p>	<p>Guy translate</p> <p>Not generated when there is no open eligibility record</p> <p>OR</p> <p>There is no open continuous placement</p> <p>OR</p> <p>Today's date > 60 days before Di_child_elig.next_maxis_rvw_dt from the most recent di_child_elig record</p>	<p>Guy translate</p> <p>di_child_elig.next_maxis_rvw_dt from the most recent di_child_elig record</p>	<p>Guy</p> <p>60 days before di_child_elig.next_maxis_rvw_dt from the most recent di_child_elig record</p>
<p>New IV-E eligibility determination</p>	<p>Eligibility record received from MAXIS (Note: MAXIS sends reminders regarding child IV-E eligibility with a pass or fail notice)</p>	<p>N/A</p>	<p>Immediate</p>	<p>N/A</p>

Alert/Reminder Text	Triggering Event (Date)	Satisfied By	Due Date	Notify Date
Alerts Note: Alerts apply only to open workgroups and to the primary workers				
Child Maltreatment				
Maltreatment conclusions are due by <date> Family Investigation Determination	Intake date with Intake Type of Maltreatment Report and Disposition of Accepted for Assessment	Need for CP services completed within 45 days of Maltreatment Intake Disposition Date	45 days	15 days
Family Assessment Conclusion	Intake accepted for assessment	Need for services completed within 45 days from Intake Disposition Date	45 days	15 days
Notice of Determinations letters by due <date>	Intake Type- Maltreatment, Disposition date and Maltreatment Assessment is Family	Document creation date of “Notice of Determinations” document within 10 days of disposition date	10 days	5 days
Family Assessment Notices are due by <date>	Intake Type- Maltreatment, Disposition date and Maltreatment Assessment is Family	Document creation date of “Notice of Determinations” document within 10 days of disposition date	10 days	5 days
CPS Plan is due by <date>	Only CP CM WGs- No CPS plan	CPS plan signed and finalized date	30 days	15 days
Out-of-Home Placement Plan (OHPP) due for child name by <date>	Placement start date for the first placement within a continuous placement currently open > 29 days	Out-of-Home Placement Plan with signed and finalized date. Due 30 days after placement start date	30 days	21 days

Alert/Reminder Text	Triggering Event (Date)	Satisfied By	Due Date	Notify Date
Alerts Note: Alerts apply only to open workgroups and to the primary workers				
Child Maltreatment				
Court Order for voluntary placement of <child name> due by <date> to retain IV-E eligibility (except for a child in foster care due solely to the child's developmental disability or emotional disturbance)	Placement start date and currently open	Placement authority changed to Court ordered within 90 days of placement start date	180 days	60 days
Review of OHPP for, child name, due by <date>	From date of most current OHPP	Review and conclude current Out-of-Home Placement Plan within 180 days of signed and finalized date	180 days, and every successive 180 days	60 days
Judicial review of voluntary placement for child name is due by <date>	Placement start date with Placing authority as Voluntary This time frame is different for children placed solely due to their own disability	Placement authority changed to Court Ordered	90 days 165 days	45 days 15 days
CHIPS petition filing for voluntary placement of child name is due by <date>	Placement start date with Placing Authority as Voluntary	Placement authority changed to Court Ordered	180 days	45 days

Alert/Reminder Text	Triggering Event (Date)	Satisfied By	Due Date	Notify Date
Alerts Note: Alerts apply only to open workgroups and to the primary workers				
Child Placement:				
Adult must be discharged from care <name> will turn 21 on <date> and must be discharged from child foster care by that date or correct the client's birth date. Discharges must be entered into SSIS within 60 days of the occurrence	Open placement, client is 21 or older	Either	0 days	15 days
Permanency hearing is due for <Name> by <date>	Continuous placement Start date. This Alert looks for an open Continuous placement/Placement pair opened in the last year, which does not have a Court Action with a Petition of Permanency	Court Action with Petition code 15, Permanency, associated with the Continuous placement	One year from the Continuous placement Start date	60 days
Adult Maltreatment				
Determination required in X days	Intake Start date	All Allegations have a Determination date	60 days from Adult Maltreatment Report date	30 days

Federal SACWIS Reminders and Alerts Requirements

Reminders and Alerts Requirement	
Name	
Identifier	r1
Description	Generate Alerts/action items (ticklers) based on results of screening
Example	
Source	Federal SACWIS I.B.2.d. - Intake Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r2
Description	Alert worker of new assignments
Example	
Source	Federal SACWIS - Intake Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r3
Description	Generate Alerts/action items in response to user-definable parameters
Example	
Source	Federal SACWIS I.C.1.c - Intake Management
Business Rules	
Related Use Cases	Enter user reminder, Remove user reminder
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r4
Description	Allow workers or supervisors to manually add ticklers
Example	
Source	Federal SACWIS III.A.6.b – Case Management
Business Rules	
Related Use Cases	Enter user reminder, Remove user reminder
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r5
Description	Allow for user-defined values for the ticklers
Example	
Source	Federal SACWIS III.B.1.d. – Case Management
Business Rules	
Related Use Cases	Enter user reminder, Remove user reminder
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r6
Description	Produce Alerts to notify worker and supervisor of activities due or overdue
Example	
Source	Federal WACWIS I.C.3.a. – Intake Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r7
Description	Produce Alerts/notices to ensure timely completion of initial determination
Example	
Source	Federal SACWIS II.A.1.e. – Initial Eligibility Determination
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r8
Description	Provide ticklers to review eligibility as required (usually every 6 months)
Example	
Source	Federal SACWIS II.A.3.c. – Initial Eligibility Determination
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r9
Description	Alert worker of children whose situation changes and may require eligibility redetermination
Example	
Source	Federal SACWIS II.B.1.a. – Initial Eligibility Determination
Business Rules	
Related Use Cases	The SSIS system does not contain associated information and cannot generate such an Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r10
Description	General ticklers to signal worker of children whose eligibility redetermination is due or overdue
Example	
Source	Federal SACWIS II.B.1.b. – Initial Eligibility Determination
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r11
Description	Produce Alerts (ticklers) to identify upcoming activities and time frames
Example	
Source	Federal SACWIS II.B.2.f. – Initial Eligibility Determination
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r12
Description	Generate Alerts to notify workers of service/case plan activities due or overdue
Example	
Source	Federal SACWIS III.A.6.a. – Case Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r15
Description	Generate Alerts to advise workers of reviews which are due or overdue
Example	
Source	Federal SACWIS III.B.1.a – Case Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r16
Description	Produce Alerts based on time frames established in State and County Policy
Example	
Source	Federal SACWIS III.B.1.b. Case Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r17
Description	Generate an Alert if someone else updates a primary worker's workgroup
Example	
Source	Federal SACWIS III.B.1.c. – Case Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r18
Description	Notify worker of changes in provider licensure status
Example	
Source	Federal SACWIS IV.A.2.a. – Resource Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	R20
Description	Generate Alert to notify worker of resource related activities due or overdue
Example	
Source	Federal SACWIS
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r21
Description	Generate Alerts/action items if license is revoked
Example	
Source	Federal SACWIS IV.B.4. – Resource Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	

Reminders and Alerts Requirement	
Name	
Identifier	r22
Description	Display all outstanding ticklers for a worker in a user-definable manner
Example	
Source	Federal SACWIS VII.A.3.c – Resource Management
Business Rules	
Related Use Cases	Generate SSIS Alert, Remove SSIS Alert
Notes	