

What exactly is a 'tickler' file?

"I've seen references to "tickler" files. Can you please explain in detail, what they are and how you create and manage them?" — *Valerie R. Butler*

Colin T December 21, 2009 at 5:57 am

I prefer a physical reminder, since electronic reminders disappear as soon as they're acknowledged. I know some will "snooze", but I don't want reminding every 3 minutes of something I need to do later that afternoon. So the piece of paper/card (used for recurring reminders) sits in my in tray until I've actioned it.

When I first started using the tickler file, I put a daily reminder on my mobile (cell) phone to remind me to look in it!

Just for reference, a tickler file doesn't need to be date orientated. It might be "situation" orientated: "bills to pay", "calls to return", "to read"; then perhaps a reminder to pay bills twice a month and so on.

Mary June 22, 2009 at 9:50 am

This was excellent...thank you for sharing.

Donna June 19, 2009 at 11:04 pm

I put reminders on my outlook calendar the day before anything is due. Outlook will pop up a message to remind me. Any paperwork needed is put in files and the file location is noted in the Outlook calendar reminder.

Michele Snyder June 4, 2009 at 12:03 pm

Like Darlene, my boss and I now use the Outlook Tasks as a tickler file and it's also a great delegation tool that he uses to delegate assignments to staff members. We meet once or twice a week, depending on volume of projects, to either follow-up or update the status of certain items. The great thing about using the task feature is that you can also insert any of your e-mail correspondence concerning that task, any documents that go along with it, or related websites, etc. for back-up purposes. It's all right there at your finger tips.

At first, this wasn't an easy sell for my boss. Let's just say organization isn't his best attribute. :o) However, given that he was willing to try something new, he's now reaping the benefits of projects coming in on time and mentally he feels more on top of his game.

By the way, this also makes it really easy for us to identify our accomplishments at the end of the year.

Rose July 19, 2017 at 2:33 pm

Agreed. The outlook task is a great tool when used properly.

Darlene May 26, 2009 at 2:02 pm

I use MS Outlook Tasks to manage any reminder I would need. It saves paper, file folders, etc. It has everything I need for all of the tasks that need to be done whether an hour, day, week, month from now. I set a reminder for myself so that I know when I need to work on that task and when it is due to be delivered. I too appreciate the info I receive through Admin Pro Forum.

Valerie Butler May 22, 2009 at 2:43 pm

Thank you to each and everyone of you who responded. I realize I do a little of some of the things mentioned (electronic and physical files).

I appreciate this venue to ask and have questions answered.

Thank you again.

Valerie

Jag May 20, 2009 at 1:40 pm

I purchased (1) accordion folder that indicates 1-31 and the months of the year included, works well. Each day I check the folder - If my supervisor has a meeting(s) coming up, and documents are needed, agenda's etc, I would place on his desk in the a.m. in order of his meetings, a copy of the announcement of the meeting along with any documents, handouts, etc. that is needed in that meeting. The months of the year contain any documents that need renewal, etc, such as subscriptions, etc. Calendars are always great, but when documents are needed, it is in the one folder.

JAG

Sharon Carlson May 18, 2009 at 7:35 am

Tickler file is used to provide you with information/paperwork that you will need at a future date and time for example you might have scheduled an interview and you would place the CV and other material you will need

into the folder for that particular day. Typically you would set up a folder (1-31) one for each day of the month and one for each month. Items you have that are for dates further out would be placed in the month folder until the present month has passed.

Janet May 15, 2009 at 7:09 pm

My 'tickler' file reminds me of EVERYTHING I absolutely must not forget. I use Microsoft Works Calendar (MS Outlook also has a calendar function, but I don't like it as well. There are probably others you can get online). I program in daily, weekly, biweekly, monthly, quarterly, and annual tasks. I can set it to repeat the tasks as often as needed. Once I've entered the task, for example, "collect all the time sheets for payroll", I can set the reminder to pop up on my monitor at the appropriate time, (in this example, on Monday at 10:00 every two weeks). I can enter appointment reminders ("remind the Doctor he has a meeting with Mr. Attorney at 2:30 on Wednesday the 12th") or birthday reminders, or tax payment reminders — EVERYTHING. I could not function without this program. I also enter and/or write tasks and appointments on a printable monthly calendar and maintain lists, but the calendar/reminder program keeps me sane.

Sue May 15, 2009 at 6:03 pm

A tickler file is a "remember to do" file. I have one that is partitioned by 31 days - one for each day of the month. If I have a project due on the 15th of the month, I will put the item in the 14th folder to remind me it is due tomorrow.

Diane Johnson-Hung May 15, 2009 at 5:30 pm

Tickler file is simply a file for reminders of doing certain things at certain times. It's handy, and I'd be lost without it. You can do this one paper or electronically. I do a little bit of both.

Carrie May 15, 2009 at 5:25 pm

My boss has "Tickler Files" and they are generally for low priority items or just something that may need to be referred back to at a later date. Any time he gives me an item for the tickler file he tells me what date to come back to him with it. After I put it in the "Tickler File" I put it in my outlook calendar for the date he requested to remind me. If you don't put it in your calendar you tend to forget about them.

Barb G May 15, 2009 at 4:08 pm

http://en.wikipedia.org/wiki/Tickler_file

Bonnie May 15, 2009 at 3:58 pm

What is a tickler file?

I've always considered a "tickler" file a "followup file". There are a number of versions.

Some have a folder where they throw notes they wish to follow up on. Some have folders for each day of the month and they put notes in those to follow up on that day. Some use "TO DO" lists for each day as follow up reminders.

I've found that most methods work if you actually use them every day.

Personally I do have hanging files with dates on them from 1-31. Toss notes in the files. I don't use these files to dump filing or other folders into. It should be for reminder notes only. Reminders for birthdays, place birthday cards into the day you want to mail them. Copy of notice for a seminar or meeting. Project Schedules, etc. I also use small lined sticky notes so i can list my priorities for the day (not just for follow up but for prioritizing) Hope this isn't too much information.

Amanda May 15, 2009 at 3:54 pm

I do what Kim does by keeping a hanging folder for each month, but I take it one step further and have added file folders for each day of the month, 1-31. This keeps me from handling pages for later in the month multiple times.

Denise Billingham May 15, 2009 at 3:54 pm

I keep a tickler file for my General Manager. I use a Desk file/Sorter that is tabbed 1-31 for each day of the month. As my GM has things he needs to follow through on at a later date, he will return them to me with the date he needs it back on. Each day I check the file to see if anything needs to go back to him that day. It is very helpful to keep everything in one file and with checking it daily I don't miss anything he needs to follow up on.

Kim May 15, 2009 at 3:48 pm

A "Tickle File" is a reminder file. As the only admin in the office, I have numerous "tickles" to remember. I do utilize my outlook calendar, however the most effective method I have found (and a solid non-electronic backup) is to maintain a hanging file which contains twelve individual file folders; one folder for each month. On the first day of each month, the corresponding months file folder is pulled from the drawer and the folder for the month that just ended is returned to the drawer. Whenever you are asked to tickle someone, simply place the appropriate documentation in the appropriate months file.

Donna B. May 15, 2009 at 3:46 pm

I am a Payroll Admin and we have a weekly payroll. A tickler file is a file or set of files that you have thing that

need to be completed in. I use a tickler file for upcoming pay-rate and schedule changes. I have a drawer with weekly pay-dates and I place all items that need to be done in that file for the specific week so nothing is missed. I believe its helpful and it will keep you organized.