Minnesota Immunization Information Connection (MIIC)
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St. Paul, MN 55164-0975
Web: www.health.state.mn.us/miic

Using Lists in MIIC

MIIC User Guidance

Organizations such as health care providers, nursing homes, child cares, and schools can use the MIIC list feature to track immunization histories and immunizations due for selected groups of individuals. This guide provides step-by-step instructions on setting up lists in MIIC, managing lists, and running reports off lists.

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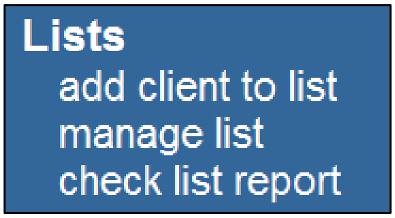
Getting Started

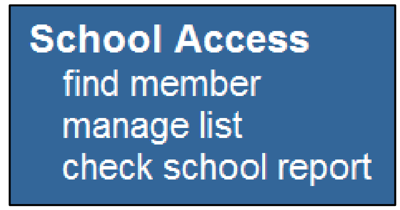
1. Log into MIIC using your organization code, username, and password.

2. In the left-hand navigation of the registry, choose the MIIC menu items related to setting up and managing lists depending on your user role:

Typical Users and Administrators



School Users

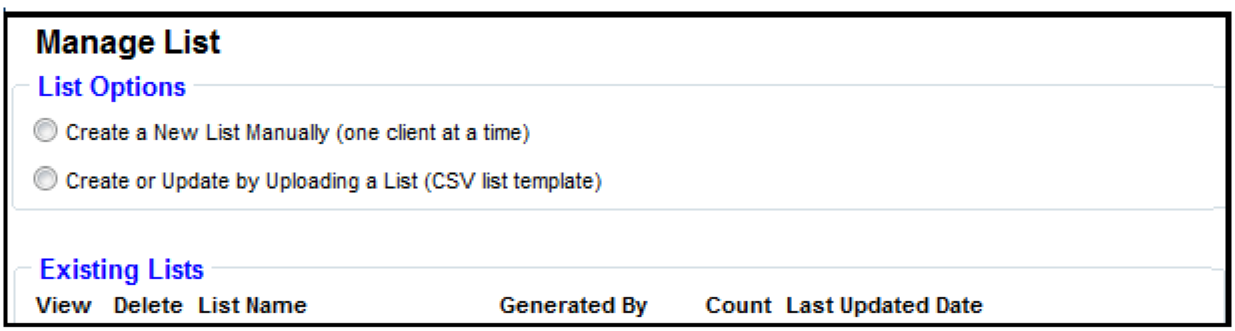


Setting up a New List

There are three options for setting up a new list:

- Creating a new list manually
- Using the MIIC Upload List/Roster Template
- Using the Save As function

For any of the three options, start by selecting **manage list** from the Lists or School Access menu. On the **Manage List** page, you have the option to create a list manually, use the MIIC Upload List Template, or use the Save As function.



Note: The Existing Lists section displays additional lists created by your organization. Lists created by one MIIC user of a specific organization will be accessible by other MIIC users within the same organization.

Creating a new list manually

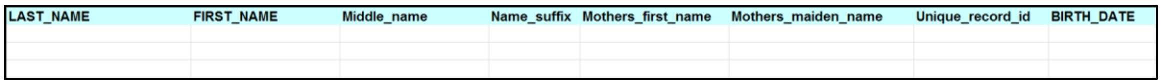
1. To create a new list manually, choose **Create Manually**. Enter a name for the new list, and click **Save**. **Note:** Use specifics in naming so you can readily know what is included in that particular list. Examples include: “Class of 2016,” “Kindergarten 2013-2014” or “Two Year Olds.” Also, every list must have a unique name. Organizations are not allowed to have two lists with the same name.

2. To add individuals to the new list, see the **Managing Lists** section in this user guide.

Creating a new list using the MIIC Upload List/Roster Template

The Upload List/Roster Template provides an easy and efficient way to create lists of individuals in MIIC. Instead of manually searching for individual clients and adding them to a list, an entire group can be added to a MIIC list at once.

1. Download the Microsoft Excel MIIC Upload List/Roster Template from the Using Lists in MIIC web page: http://www.health.state.mn.us/divs/idepc/immunize/registry/hp/trainlists.html. The template is also available in MIIC, within the **Manage List** > **Create or Update by Uploading a List** section.



2. Fill in the template rows for individuals to be included on the list. Required fields are shown for emphasis in all caps. **You need to keep the columns in the same order; do not re-arrange, add or delete any columns.**

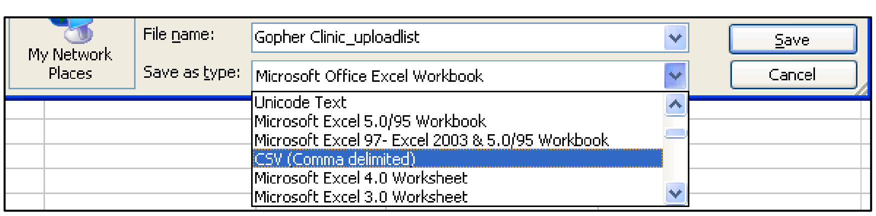
   Required Fields
   - **LAST NAME**
   - **FIRST NAME**
   - **BIRTH DATE**: Use the MM/DD/YYYY format

   Strongly Encouraged Fields (these aid in client matching in MIIC)
   - **Middle name**
   - **Mother's maiden name**

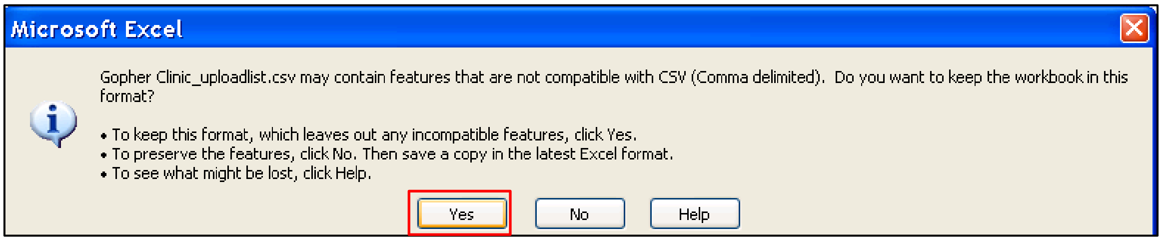
   Optional Fields
   - **Name suffix**: JR, III, etc., for example
   - **Mother's first name**
   - **Unique record identifier**: The number that your internal system uses to uniquely identify a person. It may be a member ID, chart number, medical record number, or student ID. During the matching process, MIIC will store this unique identifier for your organization, which will make subsequent matching more accurate. **However, if you think your unique number for a person will change, then we encourage you to NOT use this field, as MIIC will try to match on the old unique number.** Do not include other fields that are not listed above.

3. Once the template is completed, save the Excel file to your desktop or network where it can be easily accessed. Then prepare the file for uploading within the MIIC application.

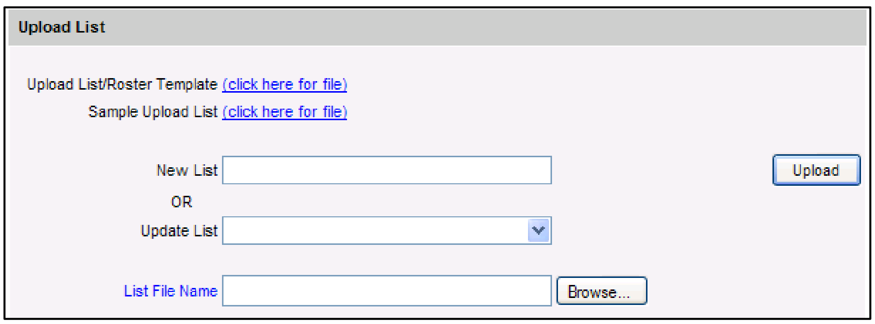
4. In order to upload to MIIC, the file must be formatted as a comma-separated value (CSV) file. To save the Excel file as a .csv file, choose **File > Save As**; in the **Save as type** drop-down, choose CSV.



5. You may receive a message asking if you want to keep the workbook in the .csv format; click **Yes**.

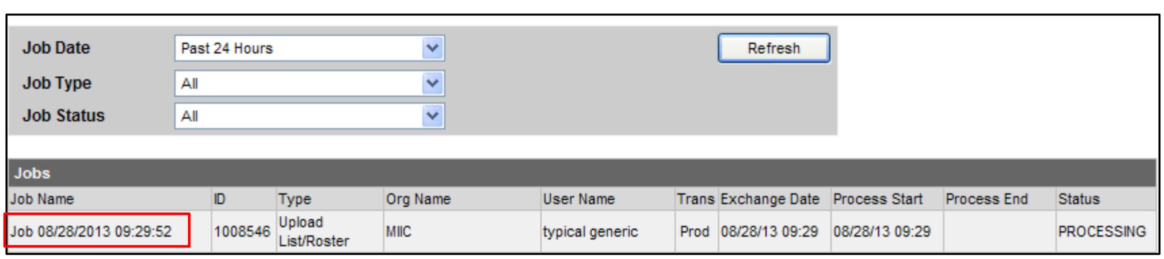


6. The CSV file is now ready for uploading into MIIC. Log into MIIC and choose **manage list** from the **List** section in the left-hand navigation. Choose **Create or Update by Uploading a List**. Insert a name for the new list, if desired. Click **Browse** to find the saved .csv file on your computer, and then click **Upload**.

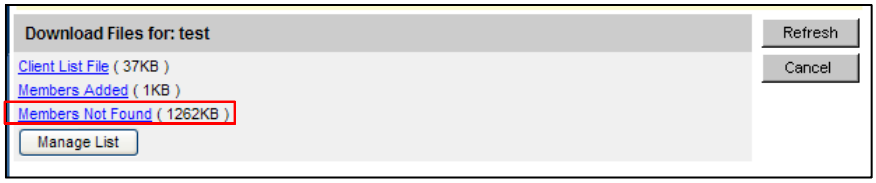


7. Click on the **Check Status** button.

8. Click the **Refresh** button until the status is complete. **Note:** you may work in other areas of MIIC while the list is processing.



9. Once the status is complete, you can click on the job name link to get access to the **Members Not Found** link. If you click on the **Members Not Found** link, you can see if any members of your list were not found in MIIC.



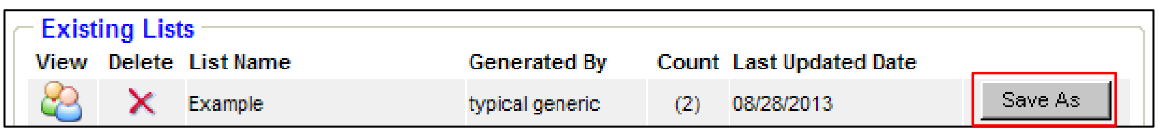
If a submitted individual is not found it is likely because a direct match could not be made based on the demographic information provided. Sample text from **Members Not Found**: "Submitted member LASTNAME, FIRSTNAME, 12/27/1985, was not found in MIIC or the demographics submitted were not complete enough to make a match. You can search MIIC manually and associate the right member to the list."

10. If there are members that weren't found, you can add individuals to the list. See the **Managing Lists** section in this user guide for more information.

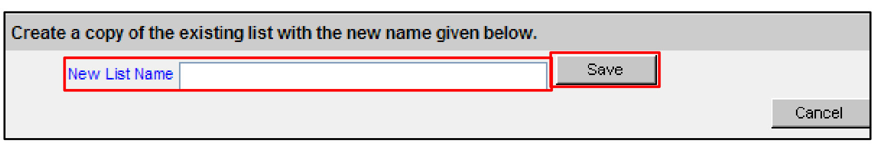
Creating a new list using the "Save As" function

The "Save As" function allows users to easily create a copy of another list that was previously created in MIIC. This function could be helpful in tracking immunizations for a group of people over time. For example, employers tracking influenza vaccination rates in their employees could copy a list they created last flu season and adjust it for the current flu season. Users can then add and delete employees from that list as needed.

1. From the **Manage List** page, find the name of the list that you would like to copy or save as a new list. Click the appropriate **Save As** button.



2. Type in a name in the box and then click **Save**. Your new list will then appear in the Existing Lists section.

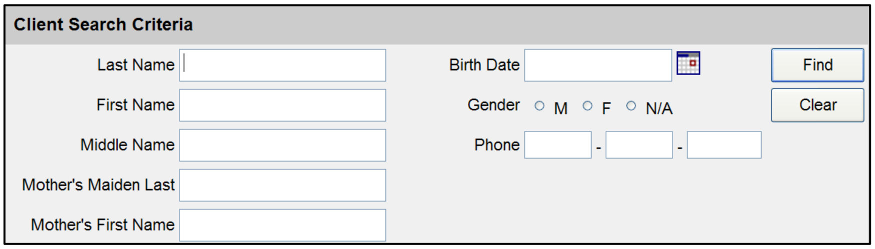


Managing Lists

This section describes adding individuals to a list manually and through the upload list/roster feature, deleting individuals from a list, and deleting entire lists.

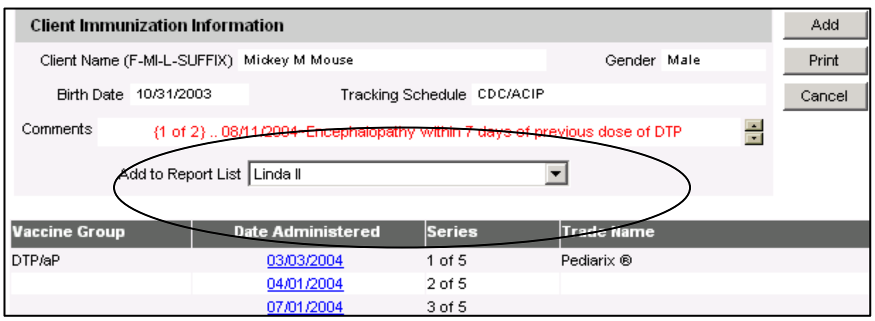
Adding individuals to a list manually

1. Choose **find member** from the **School Access** menu (School User) or **add client** to list from the **Lists** menu (Typical or Administrator Roles). This brings up the **Client Search Criteria** screen.



2. Find a student or client by entering at least two search criteria. Search using a minimum of three characters of the last name and two characters from the first name. Enter more characters to narrow the search. You could also search by few characters of the last name and DOB, for example. Select the individual of interest.

3. Once an individual is selected, MIIC will display their immunization history, what vaccines are recommended, and any contraindications to vaccination. Verify that the individual selected is whom you were searching for. If it is not the right individual, click **Cancel** to search again. If it is the right individual, add them to a list by selecting the list under **Add to Report List** drop-down menu. Once the list is selected, click the **Add** button.

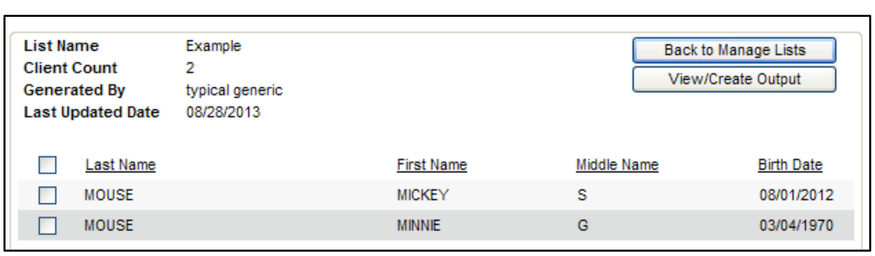


4. You will receive a message that says "Client has been added to the selected list." To add another individual, go back to Step 1 of Adding Individuals to a List Manually. Continue until you finish adding the individuals of interest.

Removing individuals from a list

1. To delete specific individuals from a list, choose **manage list** in the left-hand navigation. Click the **view icon** for the specific list. This will take you to a screen with a list of all of the members.

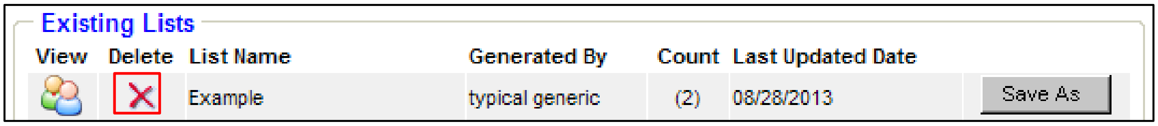
2. If you have a large list and would like to easily find individuals, you can sort the list by clicking on the headings (Last name, First name, Birth Date, etc.).



3. Put a check in the box in front of the individual’s(s’) name(s) to be deleted. Click the **Remove From List** button at the bottom of the page to remove the selected individual(s).

Deleting lists

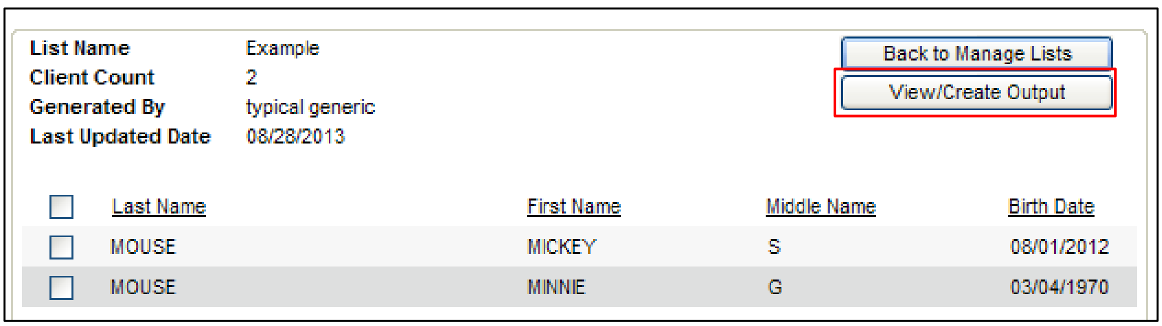
1. To delete an entire list, choose **manage list** in the left-hand navigation. Click the **delete icon** on the line of the list you want deleted. This icon is the red X.



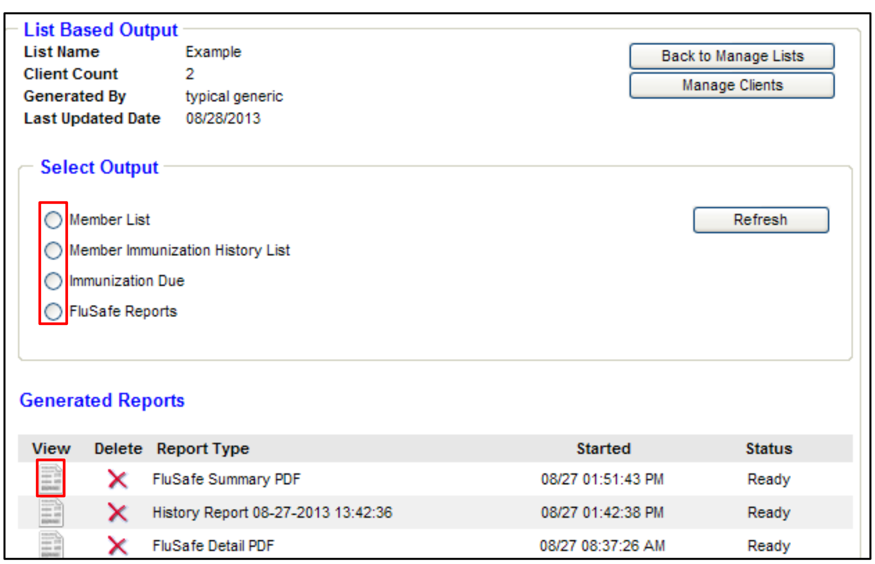
Running List-Based Reports

To run a report, go back to the menu item **manage list**. Go to the Existing Lists section and click on the **view icon** for your chosen list.

1. Click on the **View/Create Output** button in the top right.



2. The reports include Member List, Member Immunization History List, Immunizations Due, and FluSafe Reports. Select the report you want by clicking on the appropriate radio button.



3. All reports will be available in the **Generated Reports** section of the page, except for the Member List reports, which will display automatically. To view the reports, click on the appropriate **view icon**.

Member List – Displays the name and date of birth for each client on the list sorted alphabetically by last name.

Minnesota Immunization Information Connection
Client Listing

Report run on: 08/28/2013 Page 1 of 1

Last Name	First Name	Middle Name	Birth Date
MOUSE	MICKEY	S	08/01/2012
MOUSE	MINNIE	G	03/04/1970

Member Immunization History List – Displays the name, date of birth and immunization history for each client on the list sorted alphabetically by last name.

Client Immunization History

Client Name (L, F M): **MOUSE, MINNEY** Birth Date: **01/01/1943** Gender: **Female**

Immunization History

Immunization	Date Admin	Series	Trade Name
Influenza	11/30/2008	1 of 1	
Pneumo-poly	05/01/2009	1 of 1	

Vaccines Recommended by Selected Tracking Schedule

Vaccine	Date Needed
Pneumo-poly	Complete
HepB	01/01/1943
Varicella	01/01/1944
Td/Tdap	01/01/1950
Influenza	11/30/2009

Immunization Due – Displays the name, date of birth and all immunization information for immunizations due for each client on the list sorted alphabetically by last name.

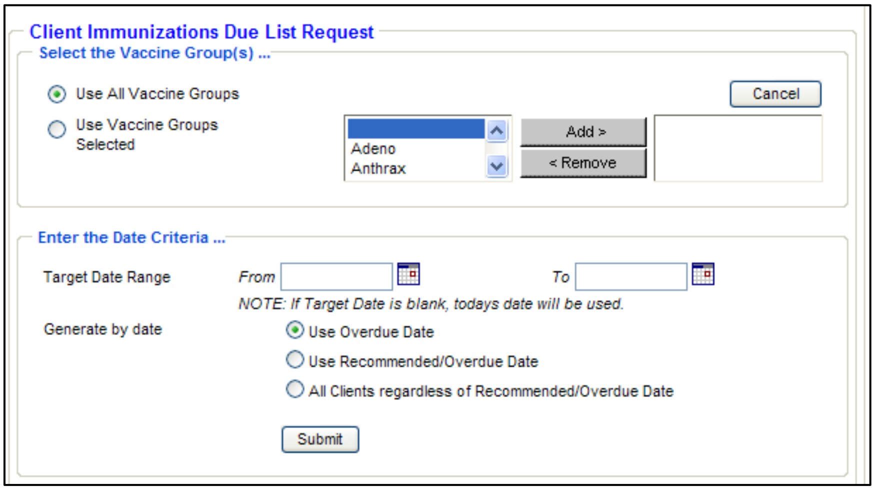
Report run on: 08/31/2012 **Client Immunizations Due List** Page 1 of 1

Client Name (F M L)

DON DUCK - 09/21/2008

Vaccine	Recmd Day	Immunization Dates
DTP/aP	11/21/2008	1) 09/21/2008 (NV)
HepA	09/21/2009	
HepB	09/21/2008	
Hib	11/21/2008	
MMR	09/21/2009	
Pneumo-conj	11/21/2008	
Polio	11/21/2008	
Varicella	09/21/2009	

1. After selecting the **Immunization Due** radio button, the **Client Immunizations Due List Request** will appear, prompting you to select additional criteria.



2. You can select all vaccine groups, or identify specific groups only. The procedure of Add and Remove is similar to what is used in other areas in MIIC.

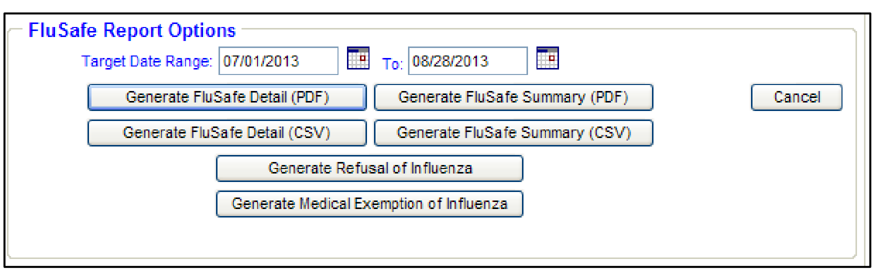
3. A **Target Date Range** can be entered, with the default today.

   Note: The **Target Date Range** will allow inclusion of those individuals who were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered. If the **To** date is unspecified, the report date range will include the **From** date up to and including today's date. If the both dates are left unspecified, then today's date will be entered for both **From** and **To**.

4. Click **Submit** when done.

FluSafe Reports – Generates reports that can be used for FluSafe participation or help users track the most current dose of flu vaccinations given to a group of people.

1. When you click on **FluSafe Reports** radio button, you will see the following options.



2. Choose a **Target Date Range**. The default date range will start with the most recent July 1st and goes through the day you are running the report (the date range of the standard flu season). This can be adjusted to any date range you choose.

3. Select the button with the report you would like:

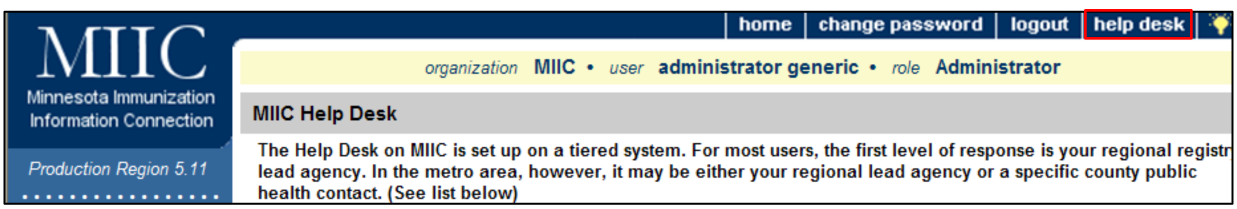
- **Generate FluSafe Summary**: summary report that includes total on list, total flu shots, percent of staff vaccinated, and percent of staff vaccinated in house.
- **Generate FluSafe Detail**: a more extensive report that also includes employee names, birth dates, and vaccination dates.
- **Generate Refusal of Influenza**: includes total on list, total refusals, percent of staff refused, employee names, comments, and date.
- **Generate Medical Exemption of Influenza**: includes total on list, total exemptions, percent of staff exempt, employee names, comments, and date.

PDF and CSV versions of the reports have all of the same information. CSV files are easier to sort and filter with external programs, like Excel, and can be helpful if you wish to group the information from these reports into similar sections.

4. The status will indicate **Ready** when done. Clicking **Refresh** allows you to keep checking for current information on report status. Click on the **view icon** when the report is ready.

MIIC Help

For assistance with using lists in MIIC, contact your MIIC regional coordinator. View their contact information on the “Help Desk” page within the registry (shown below) or on the Minnesota Department of Health MIIC website: http://www.health.state.mn.us/divs/idepc/immunize/registry/map.html.



For more information, contact MIIC:
Email: health.miichelp@state.mn.us
Web: www.health.state.mn.us/miic
MIIC Help Desk: 651-201-5503, 800-657-3970