DEPARTMENT OF HEALTH

MIIC Component: Client Follow-Up

TROUBLESHOOTING GUIDE

This guide will work as a tool to summarize and answer questions regarding the Client Follow-Up feature in Minnesota Immunization Information Connection (MIIC). See the “note” sections for helpful tips regarding specific steps in Client Follow-Up in MIIC.

Contents

Summary of Steps for Client Follow-Up in MIIC

Creating a Follow-Up

- **Log into MIIC and choose a method to create a follow-up cohort:**
  - Create manually
  - Create from an existing list
    - For more information on using the Lists feature, refer to Using Lists in MIIC (www.health.state.mn.us/people/immunize/miic/train/uselists.html).
- **Choose the follow-up specifications:**

  - Overdue
  - Recommended
  - Overdue or Recommended
  - All clients regardless of vaccination status
- **Select Vaccine Type**
  - Vaccine Grouping(s) and/or Individual Vaccine(s)
    - Vaccine pick list of child or adolescent vaccine groupings or individual vaccines
  - COVID-19
    - Doses cannot be left blank.

Note: One-dose series products will not be listed in the product dropdown. To get patients/clients in for a one-dose series, you can create follow-up of COVID-19, leave the Vaccine [Trade Name] dropdown blank, and then select 0 from the Dose(s) Received dropdown to get a list of patients/clients who have not received any COVID-19 doses.

- **Enter a name for the follow-up report**
  - This name should be simple and intuitive to the user.

Note: You may browse other areas of MIIC while waiting for the report, it will not interrupt this search process.

Managing Client Follow-Ups

- Click on the view icon (looks like two people) once the status says ready.
  - List of clients will now be displayed.
- Clients can be sorted by selecting a column name and sorting the direction.
  - An option for second sorting criteria is available as well by selecting the red plus sign.
  - To view a single client's record, select their last name. Their MIIC record will appear in a new window.
  - Any changes made to the data **will not** show up in any of the reports until the **next day.** Please check MIIC again the following day if you choose to clean data.

Client Follow-Up Outputs

- **Client Report**
  - This will be in the form of a PDF file.
  - This PDF can be printed and used as a tracking sheet.

- Check the "Reminder Sent" box to indicate that a reminder has been sent to the client.
- Check the "Remove Client" box to remind you to remove the client association in MIIC.

- **Mailing Labels**
  - The PDF can be printed directly to a 3-by-10-inch label sheet to be used for mailings.
  - The number above the client's name on each label is the MIIC ID for the client.
  - These labels cannot be edited, if a client has opted out of reminder recall contact, they will not appear on this list.
- **Mail Merge**
  - You can save this file to your computer as either a Microsoft Excel file or open it immediately in Microsoft Excel. This file can then be customized.
- **Contact List**
  - This list will be in the form of a Microsoft Excel file and will contain the same information that was displayed on the Client Follow-Up screen.

Frequently Asked Questions

Creating a Follow-up

- **Should I create a follow-up manually or from a list?**
  - It depends on the group of people you'd like to know about. Manual follow-ups are good for population-based or organization/provider cohorts. Manual follow ups will pull all clients associated with an org in MIIC. List-based follow-ups are good for cohorts of already-established lists of clients of whom you would like to know vaccination status.
- **How do I create a list?**
  - Refer to [Using Lists in MIIC (www.health.state.mn.us/people/immunize/miic/train/uselists.html)](www.health.state.mn.us/people/immunize/miic/train/uselists.html) for more information on the lists feature.
- **Can I create a follow-up of only people my organization has vaccinated for COVID-19?**
  - To create a cohort of only people your organization has vaccinated for COVID-19, you should create a list and then conduct a follow-up from an existing list.

Vaccine Type:

- **Why can't I see the "Vaccine Type" section?**
  - This section will disappear if you select "All Clients Regardless of Vaccination Status" as the follow-up type.

  - To do a follow-up for certain vaccines, vaccine groupings, or for COVID-19, the follow-up specification must be "Overdue", "Recommended", or "Overdue or Recommended".

Vaccine Grouping(s) and/or Individual Vaccine(s):

- **Why can't I see all of the available routine vaccines?**
  - The list of all routine vaccines is only viewable if "Vaccine Grouping(s) and/or Individual Vaccine(s)" is selected under the "Vaccine Type" header.
- **Can I conduct a follow-up for COVID-19 and other vaccines using the "Vaccine Grouping(s) and/or Individual Vaccine(s)" option?**
  - Yes, COVID-19 can be selected along with other vaccines when using this function.

COVID-19:

- **Why does the "Vaccine Group" dropdown only have COVID-19?**
  - This feature is only available for COVID-19. Additional vaccine groups will be added in the future, but for now it can only be used for COVID-19 follow-up**.**
- **What is in the "Vaccine [Trade Name]" dropdown?**
  - This dropdown includes all active two dose series COVID-19 vaccine products. This field is optional and can be used to do product specific follow-up**.**
- **Dose(s) Received:**
  - This dropdown allows the user to do follow-up for clients who have received a certain number of doses of COVID-19 vaccine. This dropdown changes with each product selected and will only display 0 if no vaccine product is selected.

Note: Leaving "Dose(s) Received" blank will prevent the follow-up from processing.

- **Why is my follow-up not processing or getting stuck at a certain percentage?**
  - To use the COVID-19 function for follow-up, the "Vaccine Group" and "Dose(s) Received" dropdowns cannot be blank.
  - If you are conducting a manual follow-up, it's possible that the cohort is too large and is taking a while to load.
  - If your screen says "Warning" in the status column in the "Manage Client Follow-Up" page, click the view icon, then select "OK" in the pop-up to process the follow-up. The final cohort will be smaller than the number displayed with the "Warning" message.
- **Why isn't the Johnson & Johnson / Janssen vaccine listed in the "Vaccine [Trade Name]" dropdown?**

  - Only multi-dose series products are listed in the trade name dropdown. Follow-up cannot be conducted on one dose series because the series is complete after one dose and people with complete series do not appear in follow-up cohorts.
  - To find clients who would be eligible for a Johnson & Johnson vaccine, conduct a follow-up leaving "Vaccine [Trade Name]" blank and selecting "0" in the "Dose(s) Received" dropdown.
- **Why can't I select "2" in the "Dose(s) Received" dropdown?**
  - All the products in the COVID-19 function are currently two dose products. Once a client receives their second dose, their series is marked as complete, and the client will no longer appear in a follow-up cohort unless the follow-up type is "All Clients Regardless of Vaccination Status."
- **Why can't I select "0" in the "Dose(s) Received" dropdown when I have a product selected?**
  - Zero is only displayed when the "Vaccine [Trade Name]" dropdown is blank in order to include all clients in need of a first dose of either product.
- **Why does my follow-up cohort contain clients that I have not given a COVID vaccine to?**
  - Client Follow-Up pulls all clients associated with your organization. This may contain clients who were vaccinated for immunizations other than COVID-19 at your organization. This may also contain clients who are associated with your organization but vaccinated for COVID-19 somewhere else.
- **Why do people who have refused a COVID-19 vaccine show up in my cohort?**
  - Refusals do not affect recommended or overdue dates for COVID-19. Anyone who has a COVID-19 refusal will still show up in the Client Follow-Up if they are recommended or overdue for a COVID-19 vaccine.
- **What is the difference between "Recommended" and "Overdue" for COVID-19?**
  - The recommended date for COVID-19 is based on the vaccine product and established guidelines for when a second dose of vaccine is recommended. The overdue date is one week after the recommended date.

Managing Client Follow-Ups:

- **What does the warning status mean?**
  - This means that you requested a large report. To proceed, select the view icon.
  - This does not mean that the follow-up will not process, but it may take longer to process than other follow-ups.
- **How do a cancel a request?**
  - You can select "Cancel" and then the delete icon (red X) on the "Manage Client Follow-Up" page.

- **How do I know when the request is ready?**
  - Look on the far left under "Status" and refresh until it displays "Ready".
- **How can I sort the list of clients?**
  - You can sort the list by selecting a column name and sorting direction. You can also add a second sorting criteria by selecting the red plus sign (+). This allows you to sort the clients by:
    a) Last name
    b) First name
    c) Date of birth (DOB)
    d) Last shot date
    e) Last shot provider
    f) Last shot date with org
    g) City (of residence)
    h) State
    i) Contact
    j) Undeliverable address
    k) Insufficient address

Note: To disassociate a person from MIIC use the "not our client" button.

- **How do I view only a single client's immunization record?**
  - Simply select their last name and their MIIC record will open in a new window.
- **What do the different colors mean based on address information?**
  - Red: No contact. The client has opted out of "Reminder and Recall" contact.
  - Orange: Undeliverable. The client's address is marked as undeliverable.
  - Yellow: Insufficient address. The client's address does not have enough information to send mail to.
- **Can I remove someone from the client follow-up cohort I created?**
  - Cohorts are generated based on clients within your organization. The only way to remove someone from the cohort is to remove the association between your organization and the client. In the client follow-up client list screen, select the person you want removed and choose the "Not our Client" button. Please refer to the Using Client Follow-Up for Mass Inactivation (www.health.state.mn.us/people/immunize/miic/train/inactivate.pdf) for more information.

- If you are running a follow-up based on a list your organization created, you can simply remove the client from the list to remove them from the follow-up cohort.

Client Follow-Up Outputs:

- **What do the label options next to the immunizations in the Client Report mean?**
  - **Needs** indicates that the client needs that immunization. If the user is conducting an overdue follow-up**,** "needs" will display next to the vaccines that are overdue. If the user is conducting a recommended or overdue/recommended follow-up, "needs" will display next to the vaccines that are recommended.
  - **Exempt** indicates that the client has a medical exemption comment in MIIC for the indicated vaccine.
  - **Immune** indicates that the client has an immunity comment in MIIC for the indicated vaccine.
  - **NV** indicates that the immunization is not valid. Immunizations are determined to be not valid when the client was not old enough to receive the immunization or not enough time elapsed between doses.
  - **Blank** space to the left of the immunization name indicates that the client is not currently recommended and/or overdue for that immunization.

> **Note:** "NEEDS" will not be displayed for COVID-19.

- **Can I create a Reminder Letter for my Client Follow-Up cohort?**
  - Reminder Letters are not currently available as a Client Follow-Up output.
- **Where can I get phone numbers and email addresses for clients in my client follow-up cohort?**
  - If a client has a phone number or email in MIIC, they will be in the contact list and mail merge outputs.
- **Why can't I see "COVID-19 Doses Report" under "Generated Reports?"**
  - The "COVID-19 Doses Report" is only available for cohorts created using the vaccine type "COVID-19." This report will not generate for any cohort created using "All Clients Regardless of Vaccination Status" as the follow-up type or "Vaccine Grouping(s) and/or Individual Vaccine(s)" as the vaccine type.
- **My client has 2 or more doses on the COVID-19 Doses Report but their series complete date is not filled in and MIIC says they are still recommended for a COVID-19 dose.**
  - The COVID-19 Doses Report will include all of a client's COVID-19 immunizations, up to three, including those marked as "NOT VALID" in MIIC.
- **My client has 3 doses on the "COVID-19 Doses Report" but their MIIC record has more.**

  - The "COVID-19 Doses Report" only shows up to three COVID-19 doses per client. This may change in the future.
- **My client has a "Series Complete Date" filled in but there is still a "Next Recommended COVID Dose" date listed.**
  - In this case, the Next Recommended COVID Dose is for the booster dose of COVID vaccine, which falls outside the primary series.

MIIC Help

For assistance with running Client Follow-Up, contact your MIIC regional coordinator. View their contact information at [MIIC Regions and Regional Coordinators (www.health.state.mn.us/people/immunize/miic/participate/regions.html)](www.health.state.mn.us/people/immunize/miic/participate/regions.html).

You can also send an email to the MIIC Help Desk using the "help desk" button on MIIC for any additional questions or use the light bulb icon to access additional user guidance resources.

health.miichelp@state.mn.us
www.health.state.mn.us

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To obtain this information in a different format, call: 651-201-5207.