Client Follow-Up

MIIC USER GUIDANCE AND TRAINING RESOURCES

This guide describes how to use the client follow-up feature in the Minnesota Immunization Information Connection (MIIC).

The purpose of the client follow-up feature is to identify clients who are recommended or overdue for selected immunizations and to facilitate follow-up with these individuals using a process called reminder/recall. This feature allows users to generate a: list of clients and their recommended or overdue immunizations, label output, mail merge output, xml output, and a contact list. These tools can be used to improve data for your organization in MIIC and client and population vaccination rates.

Contents

Getting started

1. Log in to MIIC using your organization code, username, and password.
2. In the left-hand side menu bar, choose **create follow-up** under **Client Follow-Up**.

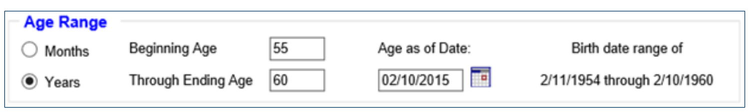
3. Choose a method for creating a follow-up cohort:

- **Create manually**: This is the most commonly used option and will help you create a follow-up list from scratch. Once selected, you can choose a variety of age cohorts that will produce an output, listing individuals that MIIC associates with your organization or area.
- **Create from an existing list**: This option allows you to choose from any list you already have created in MIIC. Find more information on how to create a list at Using Lists in MIIC (www.health.state.mn.us/people/immunize/miic/train/uselists.html).

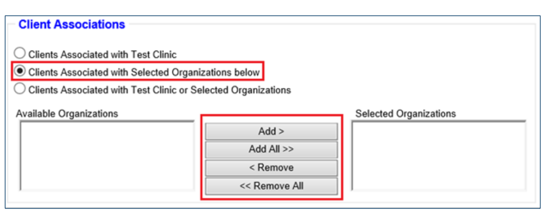
Creating a follow-up cohort manually

1. Select **Create Manually** on the **Create Client Follow-Up** page.

2. In the **Age Range** section, select the age range information.
   - Choose whether the age range will be measured in months or years.
   - Enter a **Beginning Age** and a **Through Ending Age**. The report will only look at the clients who are between the beginning age and the ending age.
   - Enter an **Age as of Date** from which the report will run. The current date will be used if no date is entered.
3. Once the age range is entered in, MIIC will display the range of birthdates that this follow-up will look at on the far right. For instance, the example below would show all adults age 55 through 60 years old (beginning age 55, ending age 60), as of February 10, 2015 (age as of date).



   - Users who run monthly follow-up reports may find it helpful to run the report the same day every month (for example, the first of the month). This will ensure that you are getting the current cohort of clients who are overdue or have recommended vaccines.
   - Also, if you have a cohort that you have done follow-up on previously, you can easily check on that cohort to see if they still have overdue or recommended vaccines. Set the **Age as of Date** to the original date used to view the clients who are still overdue or have recommended vaccines.
4. If you are not a local public health user, skip to step 5. Local public health users have an additional option to conduct follow-up on residents of selected counties. You can choose which clients to include in the follow-up report from the options listed below:



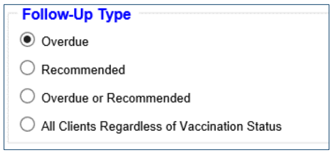
- Clients associated with [organization name]: This includes clients associated with your organization. This is a commonly used option.
- Clients residing in selected counties below: This includes residents in MIIC of the county or counties you select, regardless of organization association. Select counties to include from the **available counties** field. Then select **Add >** so they appear in the selected counties field.
- Clients within [organization name] or residing in selected counties: This includes clients associated with your organization and clients residing in counties you select.

5. If you are not a user at a **parent organization** (typically the main location or administrative site of an organization with associated sites), skip to step 6.
   Parent organizations have an additional option to select clients from associated sites (which are set up as separate organizations in MIIC) for follow-up. You can choose which clients to include in your follow-up report from the options listed below.

- **Clients associated with [organization name]**: This includes clients associated with your organization. This is a commonly used option.
- **Clients associated with selected organization below**: This includes clients associated with the organization(s) you select. Select the organization(s) to include from the **available organizations** field. Then select **Add >** so they appear in the **selected organization** field.
- **Clients within [organization name] or associated with selected organizations**: This includes clients associated with your organization and clients associated with organizations you select.

Choosing follow-up specifications

1. Select the **Follow-Up Type** from the available options listed below. The definitions of **Overdue** and **Recommended** are based on guidelines determined by the Advisory Committee on Immunization Practices (ACIP).

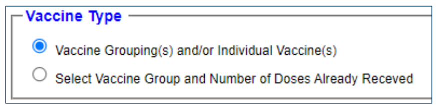


- **Overdue**: All clients, in the specified cohort, who are overdue/late for vaccines.
- **Recommended**: All clients, in the specified cohort, who are recommended/due for vaccines.
- **Overdue or recommended**: All clients, in the specified cohort, who are overdue/late or recommended/due for vaccines.

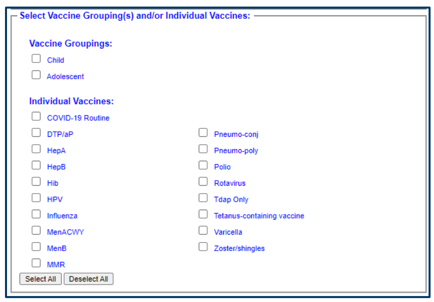
- **All clients regardless of vaccination status:** All clients in the specified cohort. This will include clients that are due, overdue, and up to date for vaccines. This report will include all people that meet the criteria used in the client follow-up creation.

Note: Selecting **All Clients Regardless of Vaccination Status** will create a follow-up with all of the clients that match the criteria so the **Vaccine Type** section will not be displayed. The client follow-up feature can only make calculations based on the vaccine information that is in MIIC. Missing information will affect the results of these reports.

2. Select the **Vaccine Type** for the report from the available options below.



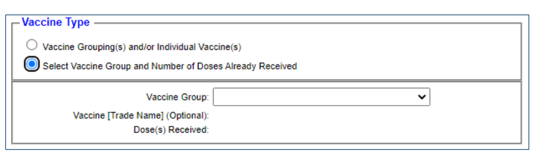
- **Vaccine Grouping(s) and/or Individual Vaccine(s):** Select the vaccines to be included in the report. There are a few ways to select vaccines to include in the report.



- **Child vaccine grouping** selects DTaP, Hep A, Hep B, Hib, MMR, Pneumo-conj, Polio, Rotavirus, and Varicella.
- **Adolescent vaccine grouping** selects HPV, Meningococcal, and Tdap Only.
- To **select or deselect individual vaccines**, you can directly select the vaccine checkboxes.
- You may also use the **Select All** button to choose all vaccines or the **Deselect All** button to deselect all vaccines and then choose vaccines individually.

Note: The **Tdap Only** selection will return all clients who have not received a dose of Tdap vaccine after age 7 years, regardless of whether an **Overdue** or **Recommended Follow-Up** type is chosen. An **Overdue** follow-up type for Tetanus-containing vaccines (Td, Tdap, DTaP, or DT) will return clients who are late for a Tetanus-containing vaccination and a **Recommended** follow-up type for Tetanus-containing vaccines will return clients who are currently due for Tetanus-containing vaccination.

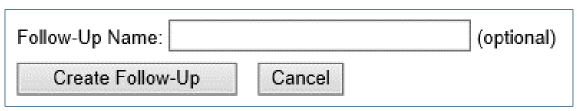
- **Select Vaccine Group and Number of Doses Already Received:** Select the combination of vaccine group, vaccine, and doses received that is desired for the report.



- **Vaccine Group:** Select a vaccine group that is currently active in this feature. Vaccine groups are added by MIIC Ops staff based on need, current disease situations, vaccine recommendations, etc.
- **Vaccine [Trade Name]:** This dropdown includes all active vaccine products for the selected vaccine group. 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 your selected vaccine. The dropdown options change depending on which vaccine group and product are selected and will only display 0 if no vaccine product is selected.
- If you have any questions about this function, please email the MIIC help desk at health.miichelp@state.mn.us.

Note: All dose values besides 0 are at least that many doses, meaning if you select 1 for dose(s) received, it will pull back every client who fits your above criteria and has received at least one dose of the selected vaccine. Selecting 0 will only pull back clients who have received no doses of the selected vaccine group.

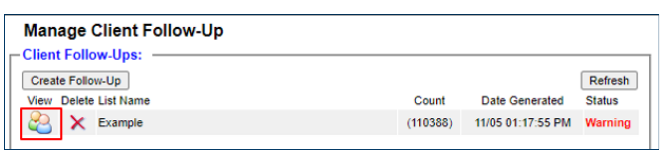
3. Enter a name for the follow-up report.



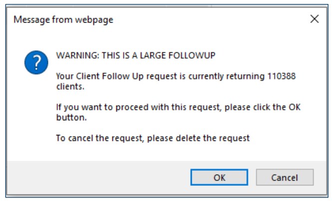
4. Select the **Create Follow-Up** button.
5. The **Manage Client Follow-Up** page will now display.

Managing client follow-ups

1. On the **Manage Client Follow-Up** screen, select the **Refresh** button periodically until the status of the report displays. You may browse to other areas of MIIC while you are waiting for the cohort to process.
   - If the status displays **Ready**, skip to step 6 in this section.
   - If the status displays **Warning**, continue with step 2 in this section.
2. If the status displays **Warning**, this means that you requested a large report. In order to proceed, select the view icon.

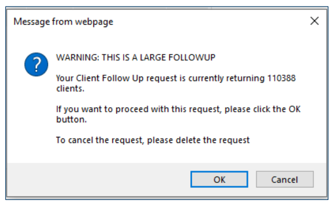


3. A pop-up message will appear. Select **OK** to continue processing (and continue to step 4). In order to cancel the request, you can select **Cancel** and then the delete icon (red X) on the **Manage Client Follow-Up** page.

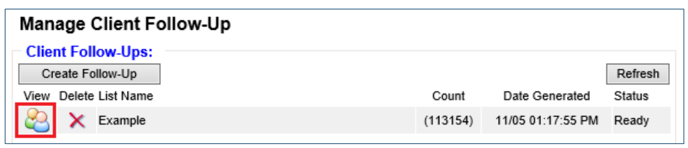


4. If you decided to continue processing, keep clicking on the refresh button until the status displays **Attention**. In order to proceed, select the view icon again.

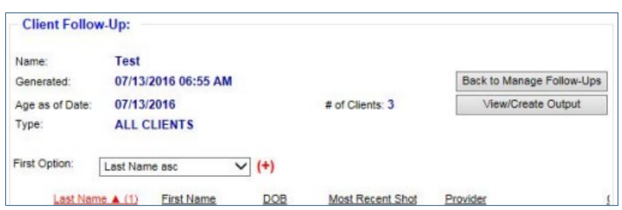
5. A similar pop-up message will appear. Select **OK** to be taken to the page that displays the list of clients. Continue to step 7 in this section.



6. Once the status says **Ready**, select the view icon to display the list of clients.



7. View the clients who fit your selected criteria. 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:



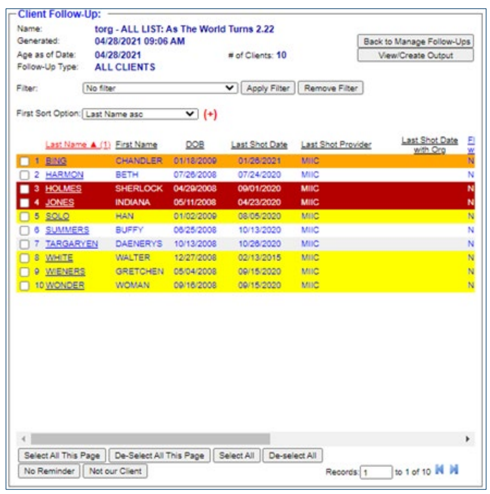
- Last name
- First name
- Date of birth (DOB)
- Last shot date
- Last shot provider
- Last shot date with org
- City (of residence)
- State
- Contact
- Undeliverable address
- Insufficient address

Note: If you have a very large list of clients, it may be easier to use the **contact list** feature, which is described later in this document.

8. If you want to view a single client's immunization record, simply select their last name and their MIIC record will open in a new window.

Note: Any changes that you make to the data at this point will not show up in the reports until the next day. If you decide to clean up your data, please check MIIC again the next day to check your reports.

9. Some records may be color coded based on their address information. The colors are as follows:
    - **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 may not be correct due to missing or incorrect address information, preventing it from successfully sending through postal mail.
10. Modify the list as needed by selecting the checkboxes next to each name and selecting either **No Reminder** or **Not our Client**.



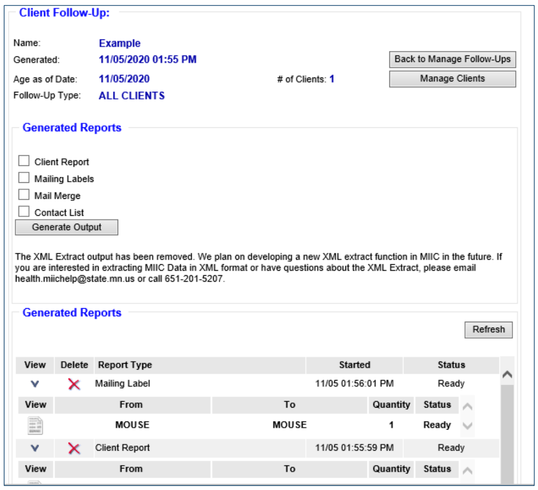
- **No reminder:** Select **No Reminder** for clients you want to remove from this follow- up cohort. This keeps the client active to your organization but removes them from the report and outputs generated from the report. For example, this could be useful if one of the clients has an upcoming appointment and you do not want them to receive a letter.
- **Not our client:** Select **Not our Client** for clients you no longer serve. Only select this if you are certain that the client is no longer a client at that organization. This selection removes the association between the client and the organization. In order for clients to be associated with that organization again, the association needs to be manually re-activated in MIIC or the client needs to receive a new immunization from that organization.

11. You can also use the below buttons to select larger groups of clients.
    - **Select all this page:** Selects all clients on this page.
    - **De-select all this page:** De-selects all clients on this page.
    - **Select all:** Selects all clients.
    - **De-select all:** De-selects all clients.

12. Once the follow-up cohort is defined, select the **View/Create Output** button. This will take you to a new page. From here, you can select from the following output options:
    - Client report
    - Mail merge
    - Mailing labels
    - Contact list

Note: Descriptions of each of these outputs and their uses can be found later in this user guide.

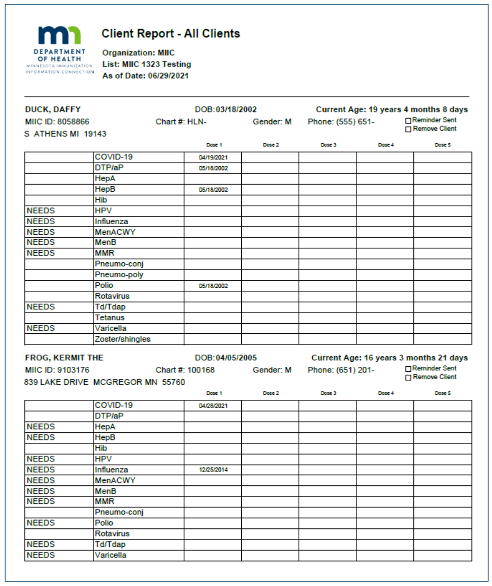
13. Select **Generate Output** to create your selected report(s). A list of generated reports will appear under the **Generated Reports** section of the page. The outputs will generate faster if you select them one at a time.
14. Select the **Refresh** button periodically to view updates on the status of the reports. While the reports are processing, you may work in other areas of MIIC or log out and come back to **Generated Reports** later to access them.
15. Once a report status displays **Ready**, select the document icon in the **View** column to open the report.



Generated reports

Client report

1. After selecting the document icon, a PDF file displays. The client report will include a section for each selected client with a list of all vaccines that are included in this client follow-up. There are three label options that may appear near the name of each immunization:


Client Report - All Clients

Organization: MIIC
List: MIIC 1323 Testing
As of Date: 06/29/2021

DUCK, DAFFY DOB:03/18/2002 Current Age: 19 years 4 months 8 days
MIIC ID: 8058866 Chart #: HLN- Gender: M Phone: (555) 651- ☐ Reminder Sent ☐ Remove Client
S ATHENS MI 19143

		Dose 1	Dose 2	Dose 3	Dose 4	Dose 5
	COVID-19	04/19/2021				
	DTP/aP	05/18/2002				
	HepA					
	HepB	05/18/2002				
	Hib					
NEEDS	HPV					
NEEDS	Influenza					
NEEDS	MenACWY					
NEEDS	MenB					
NEEDS	MMR					
	Pneumo-conj					
	Pneumo-poly					
	Polio	05/18/2002				
	Rotavirus					
NEEDS	Td/Tdap					
	Tetanus					
NEEDS	Varicella					
	Zoster/shingles					

FROG, KERMIT THE DOB:04/05/2005 Current Age: 16 years 3 months 21 days
MIIC ID: 9103176 Chart #: 100168 Gender: M Phone: (651) 201- ☐ Reminder Sent ☐ Remove Client
839 LAKE DRIVE MCGREGOR MN 55760

		Dose 1	Dose 2	Dose 3	Dose 4	Dose 5
	COVID-19	04/28/2021				
	DTP/aP					
NEEDS	HepA					
NEEDS	HepB					
	Hib					
NEEDS	HPV					
NEEDS	Influenza	12/25/2014				
NEEDS	MenACWY					
NEEDS	MenB					
NEEDS	MMR					
	Pneumo-conj					
NEEDS	Polio					
	Rotavirus					
NEEDS	Td/Tdap					
NEEDS	Varicella					

- **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. Please note, **NEEDS** will not display for COVID19 at this time.
- **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: For the Td/Tdap row, an asterisk next to the date indicates a Tdap vaccination.

2. This PDF can be printed and used as a tracking sheet. Once printed, the **Reminder Sent** box can be checked to indicate that a reminder has been sent to that client, and the **Remove Client** box can be checked to remind you to remove the client association in MIIC.

Mailing labels

1. Select the **Mailing Labels** option to open a PDF of client mailing labels. The PDF can be printed directly to a common 3 inch by 10-inch label sheet that you can use for mailings. The number above the client's name on each label is the MIIC client ID number. This number may help identify clients in case there is returned mail.

6714871 DON DUCK 123 1ST ST. ST. PAUL MN 55555	7791337 MICKEY MOUSE 345 2ND ST. ST. PAUL MN 55555	6853705 MINNIE MOUSE 678 3RD ST. ST. PAUL MN 55555

Note: The labels cannot be edited. Clients who have opted out of reminder/recall contact or have an undeliverable address will not appear on this output.

Mail Merge

1. Select the **Mail Merge** option for mail merge information. When selected, you have the option to save this file to your computer as a Microsoft Excel file or open immediately in Microsoft Excel. You can pull your mail merge information from this Excel file for use in a Microsoft Word document. You can customize the file by adding columns to get the names to show on the envelope or label precisely the way you need them to display.

	A	B	C	D	E	F	G	H	I	J	K	L
1	MIIC ID	LAST NAME	FIRST NAME	ADDRESS	ADDRESS OTHER	PO BOX	CITY	STATE	ZIP CODE	AREA CODE	PHONE NUMBER	EMAIL
2	9048853	BATES	NORMAN	625 ROBERT ST N			SAINT PAUL	MN	55155	651	2013980	
3	9088901	DOG	SLINKY	123 DISNEY WAY			ORLANDO	FL	12486			testemail@test.com
4	8058866	DUCK	DAFFY	S			ATHENS	MI	19143	555	6515412	
5	9103176	FROG	KERMIT	839 LAKE DRIVE			MCGREGOR	MN	55760	651	2015207	testemail@test.com
6	9088900	GUS	GUS	1180 SEVEN SEAS DRIVE			LAKE BUENA VISTA	FL	32836			
7	9048861	PAN	PETER	625 ROBERT ST N			SAINT PAUL	MN	55155	651	2013980	
8	9088899	PENGUIN	WHEEZY	234 ELM STREET			PIXAR	CA	90210			
9	9088902	STORY	REX	123 ANDY S ROOM LANE			TOYLAND	LA	84515			

- Mail merge contains MIIC ID, last name, first name, address, other address field, PO box, city, state, zip code, area code, phone number, and email address.

Note: If you choose to open the file immediately instead of saving the file and then opening, you will have to save the file to your computer to access it in the future without going back into MIIC and accessing the report. Clients who have opted out of reminder/recall contact or have an undeliverable address will not appear on this output.

Contact list

1. Select the **Contact List** option under **Client Report** for a list of client contact information. When selected, you have the option to save this file to your computer as a Microsoft Excel file or open it immediately in Microsoft Excel. The Excel spreadsheet includes the same information that was displayed on the client follow-up screen. The spreadsheet makes it easy to search for and sort a large list of clients.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Organization: MIIC													
2	MIIC Organization ID: 36													
3	Client Follow-Up Name: all 1323													
4	Age Range: - MONTH(S)													
5	As of Date: 05/20/2021													
6	Type: All Clients													
7	Generated: 05/20/2021													
8	Number of Clients: 12													
9														
10	Record	MIIC ID	Last Name	First Name	DOB	Most Recent Shot	Provider	City	State Zip	Area Code	Phone Nu	Email	Undeliver	Contact
11	1	9103175	BARNEY	HEAVEN	12/15/1999	4/27/2021	MIIC					testemail@test.com	N	Y
12	2	9048853	BATES	NORMAN	9/25/1959	2/28/2021	MIIC			651	2013980		N	Y
13	3	9048856	CORLEONE	VITO	1/25/2011	3/1/2021	MIIC	NEW YORK CITY	10029	651	2015207		N	Y
14	4	9088901	DOG	SLINKY	11/13/1999	2/1/2021	MIIC					testemail@test.com	N	Y
15	5	8058866	DUCK	DAFFY	3/18/2002	4/19/2021	MIIC	ATHENS	MI 19143	555			N	Y
16	6	9088898	ELTON	ELFIE	12/24/2010	3/2/2021	MIIC						N	Y
17	7	9103176	FROG	KERMIT	4/5/2005	4/28/2021	MIIC			651	2015207	testemail@test.com	N	Y
18	8	9088900	GUS	GUS	3/4/1950	3/3/2021	MIIC	LAKE BUENA VISTA	FL 32836				N	Y
19	9	9048861	PAN	PETER	8/21/1988	3/3/2021	MIIC			651	2013980		N	Y
20	10	9103174	PEEP	LITTLE	5/1/2005	4/27/2021	MIIC			651	2015321	testemail@test.com	N	Y

- The contact list contains record number, MIIC ID, last name, first name, date of birth, most recent shot date, provider, city, state, zip code, area code, phone number, email address, undeliverable address indicator, and contact indicator of all clients that were in the cohort.

MIIC help

Refer to the Client Follow-Up Troubleshooting Guide (www.health.state.mn.us/people/immunize/miic/train/followtrouble.pdf) for answers to common questions with the Client Follow-Up feature. 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.

Minnesota Department of Health
Minnesota Immunization Information Connection (MIIC)
PO Box 64975, St. Paul, MN 55164-0975
health.miichelp@state.mn.us | www.health.state.mn.us/miic

04/09/2025

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