

Using Client Follow-Up for Mass Inactivation

MIIC USER GUIDANCE AND TRAINING RESOURCES

This guide describes how to inactivate a group of clients using the client follow-up feature in MIIC. This process can be useful if you have clients that are associated with your organization in MIIC but have moved or sought care elsewhere.

Only do mass inactivation if you are certain that you have clients in MIIC that should no longer be associated with your organization. Inactivation removes the association between the client and the clinic. This means that clients who are inactivated by a clinic will not be included in the clinic’s assessment reports or the client follow-up reports in MIIC.

In order for clients to be associated with your clinic again, you will need to manually activate their record in MIIC or give the client a new immunization from your clinic.

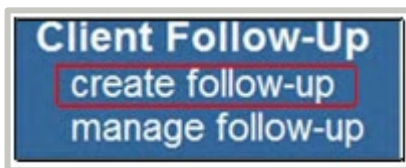
- Getting Started..... 1
- Creating Client Follow-Up for Mass Inactivation 1
- Managing Client Follow-Ups 2
- MIIC Help..... 4

Getting Started

1. Log in to MIIC using your organization code, username, and password.
2. In order to do a mass inactivation of clients, you need to set up a list in MIIC of clients that are no longer active within your organization. Find more information on how to create a list at [Using Lists in MIIC: MIIC User Guidance and Training Resources](https://www.health.state.mn.us/people/immunize/miic/train/uselists.html) (<https://www.health.state.mn.us/people/immunize/miic/train/uselists.html>).

Creating Client Follow-Up for Mass Inactivation

1. In the left-hand side menu bar, choose “create follow-up” under “Client Follow-Up.”



2. Choose “Create from existing list” under “How to Create Follow-Up.”



- Under “Select List”, choose the name of the list that you want to use from the drop down box.

The screenshot shows a form titled "Select List" with a label "List Name:" followed by a dropdown menu with a downward arrow.

- Under “Follow-Up Type”, select the “All Clients Regardless of Vaccination Status” radio button.

The screenshot shows a form titled "Follow-Up Type" with four radio button options: "Overdue", "Recommended", "Overdue or Recommended", and "All Clients Regardless of Vaccination Status". The "All Clients Regardless of Vaccination Status" option is selected and highlighted with a red box.

- You also have the option to enter a name for the follow-up report. Click the “Create Follow-Up” button to finalize the cohort setup.

The screenshot shows a form with a label "Follow-Up Name:" followed by an input field and the text "(optional)". Below the input field are two buttons: "Create Follow-Up" and "Cancel". The "Create Follow-Up" button is highlighted with a red box.

- After clicking the button, the “Manage Client Follow-Up” page will display.

Managing Client Follow-Ups

- Click the refresh button periodically until the status of the report displays as “ready”.

The screenshot shows a table titled "Client Follow-Ups:" with a "Create Follow-Up" button. The table has columns for "View", "Delete", "List Name", "Count", "Date Generated", and "Status". A row is shown with a red 'X' icon, "MIIC - ALL LIST: 2013 Cohort 2", and "11/23 10:48:55 AM". The "Status" column shows "Processing". A "Refresh" button is highlighted with a red box.

Note: You may browse to other areas of MIIC while you are waiting for the cohort to process. If you do this, you will need to click on “manage follow-up” under the “Client Follow-Up” section to return.

- Once the status displays “ready”, click on the view icon to display a list of the clients.

The screenshot shows the same table as above, but the "Status" column now shows "Ready". A "Refresh" button is highlighted with a red box. The "View" column for the first row now shows a group of people icon, which is also highlighted with a red box.

- To select all the clients on the list, you will need to click on the “Select All” button at the bottom of the screen. This will select all clients in your list by placing a check in the boxes in the column to the left of “Last Name”.

Client Follow-Up:

Name: **MIIC - ALL LIST: Test 2**

Generated: **11/23/2020 10:53 AM** Back to Manage Follow-Ups

Age as of Date: **11/23/2020** # of Clients: 3 View/Create Output

Follow-Up Type: **ALL CLIENTS**

First Sort Option: Last Name asc (+)

	<u>Last Name ▲ (1)</u>	<u>First Name</u>	<u>DOB</u>	<u>Last Shot Date</u>	<u>Last Shot Provider</u>	<u>City</u>
<input checked="" type="checkbox"/>	1 DOG	GOOFY	08/16/1982	09/01/2015	MIIC	MAPI
<input checked="" type="checkbox"/>	2 DUCK	DONALD	01/01/1944	02/07/2012	Mankato Clinic - Mapleton Family Practice	MANI
<input checked="" type="checkbox"/>	3 MOUSE	MICKEY	12/30/1993	07/09/2020	MIIC	

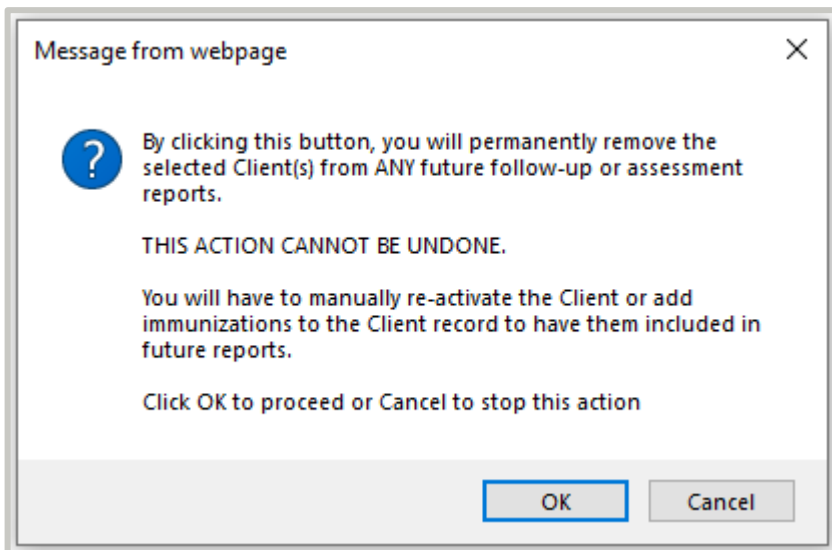
Records: 1 to 1 of 3

Note: As you move onto additional pages, the check marks on the records from previous pages will remain selected.

- Select the “Not Our Client” button at the bottom of the screen.

Note: Only select this if you are certain that the client is no longer a client at your organization. This selection removes the association between the client and the clinic. In order to associate the client with the clinic again, you will need to manually activate their record in MIIC or give the client a new immunization from your clinic.

- A warning message will appear. Select “OK” to finalize the process. Once you do this, all members from the list will be removed from the follow-up screen and will appear blank.



Note: The mass inactivation process will finalize overnight. If any client follow-up or assessment report lists are created during this processing time, MIIC will still list these individuals. Please wait until the following day to process any reports.

MIIC Help

For assistance with running client follow-up for mass inactivation, contact your MIIC regional coordinator. View their contact information at [MIIC Regions and Regional Coordinators \(https://www.health.state.mn.us/people/immunize/miic/participate/regions.html\)](https://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.



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