

Setting Up and Managing Lists

MIIC USER GUIDANCE TRAINING RESOURCE

The following guide describes instructions on setting up and managing lists in MIIC. Organizations use the MIIC list feature to track immunization histories and immunizations due for selected groups of individuals.

If you are interested in using our “Client Query” function, please refer to the [Minnesota Immunization Information Connection \(MIIC\) Submit Client Query User Guide \(PDF\)](https://www.health.state.mn.us/people/immunize/miic/data/clientquery.pdf) (<https://www.health.state.mn.us/people/immunize/miic/data/clientquery.pdf>).

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Getting Started

1. Log into MIIC using your organization code, username, and password.
2. Depending on your role in MIIC, the left side menu bar may look different. Find and select the “manage list” button.

- Typical user

The screenshot shows the MIIC (Minnesota Immunization Information Connection) web application. The top navigation bar includes links for 'home', 'manage my account', 'logout', and 'help desk'. Below this, the user's role is identified as 'Typical User'. The left sidebar contains a menu with categories like 'Routine Functions', 'Client Follow-Up', 'Assessment Reports', 'Lists', 'Data Submission', 'Vaccine Usage', and 'Inventory'. The 'manage list' option under the 'Lists' category is circled in red. The main content area is divided into sections: 'announcements' with a list of recent updates (e.g., 'MIIC release 7.22 is live'), 'upcoming events' (currently none listed), and 'resources on the web' (including 'MIIC User Guidance and Training Resources' and 'MDH MIIC Home Page').

- Read only user

This screenshot shows the MIIC web application interface for a 'Read Only' user. The layout is identical to the 'Typical User' view, but the role is 'Read Only'. The 'manage list' option in the left sidebar is circled in red. The announcements and resources sections are the same as in the previous screenshot.

Setting up a New List

1. There are three options for setting up a new list:
 - A. Create a new list manually (one client at a time)
 - B. Create or update by uploading a file (CSV Template)

C. Using the “save as” function to create a new copy of an existing list.

- **Note:** This option is only available if your organization has created existing lists.

Create a New List Manually (one client at a time)

1. To create a new list manually, choose “Create a New List Manually.” Enter a name for the new list, and click “Save.”

The screenshot shows the 'Manage List' interface. Under the 'List Options' section, the radio button for 'Create a New List Manually (one client at a time)' is selected and circled in red. Below this, there is an 'Existing Lists' table with columns for 'View', 'Delete', 'List Name', 'Generated By', 'Count', and 'Last Updated Date'. A table row shows a list named 'Test 2' generated by 'MIIC User' with a count of '(3)' and a last updated date of '07/21/2020'. A 'Save As' button is visible to the right of the table row.

A. **Note:** Be specific in naming so you can know who 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 exact case-sensitive name (e.g. MIIC List” and “miic list” would be considered different).

2. To add individuals to the new list, please refer to the [Managing Lists](#) section in this user guide.

Create or Update by Uploading a File (CSV Template)

The CSV 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.

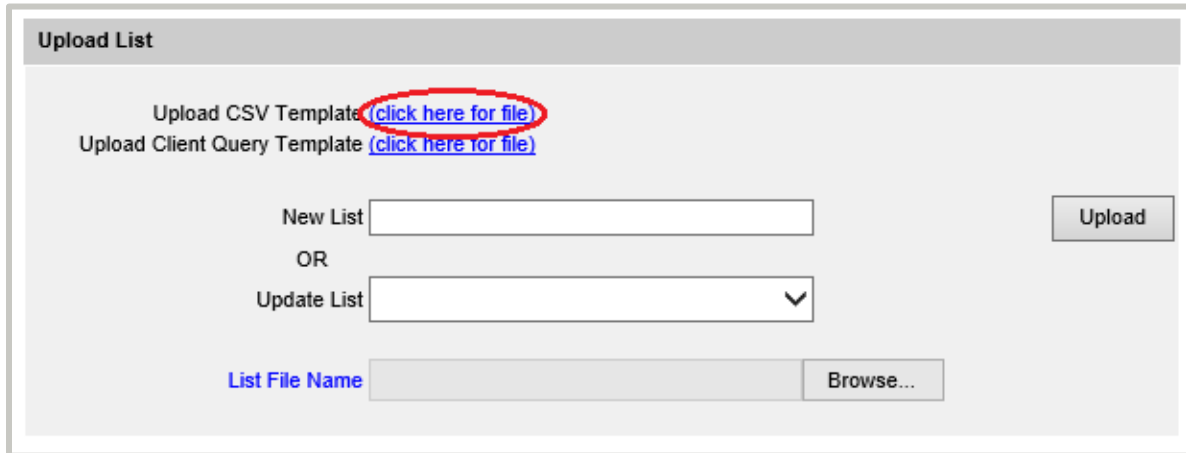
1. To create or update by uploading a list, choose “Create or Update by Uploading a File.” If you have already created your CSV template, go to Step 6.

The screenshot shows the 'Manage List' interface. Under the 'List Options' section, the radio button for 'Create or Update by Uploading a File' is selected and circled in red. Below this, there is an 'Existing Lists' table with columns for 'View', 'Delete', 'List Name', 'Generated By', 'Count', and 'Last Updated Date'. A table row shows a list named 'Test 2' generated by 'MIIC User' with a count of '(3)' and a last updated date of '07/21/2020'. A 'Save As' button is visible to the right of the table row.

SETTING UP AND MANAGING LISTS IN MIIC

2. On the “Upload List” page, click on the “Upload CSV Template” download link. This will open a .zip file which you can open to find a Microsoft Excel comma-separated value (CSV) file titled “uploadlist”. Open the .csv file.

Note: If you are interested in using our “Client Query” function, please refer to [Minnesota Immunization Information Connection \(MIIC\) Submit Client Query User Guide \(PDF\)](https://www.health.state.mn.us/people/immunize/miic/data/clientquery.pdf) (<https://www.health.state.mn.us/people/immunize/miic/data/clientquery.pdf>).



Upload List

Upload CSV Template [\(click here for file\)](#)
Upload Client Query Template [\(click here for file\)](#)

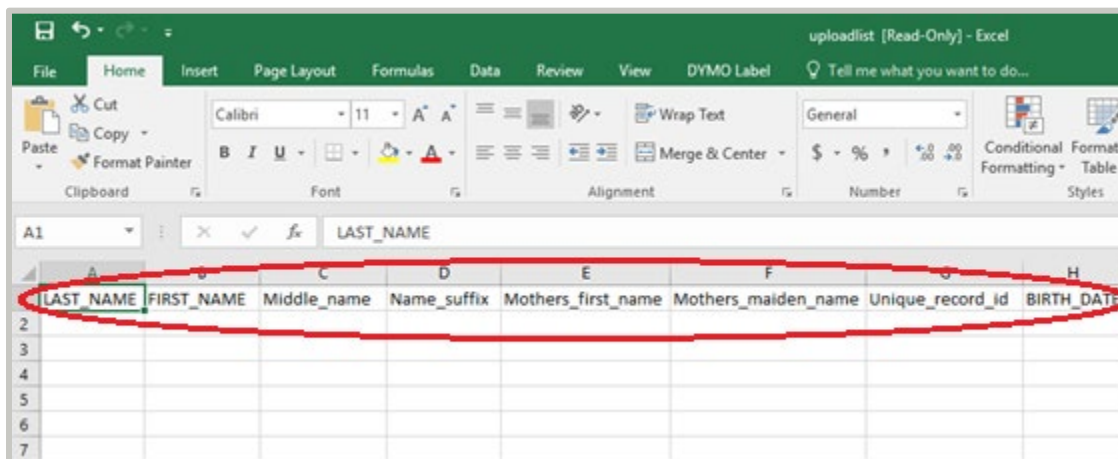
New List

OR

Update List

List File Name

3. Fill in the template rows for each individual to be included on the list. **Do not re-arrange, add, or delete any columns.**

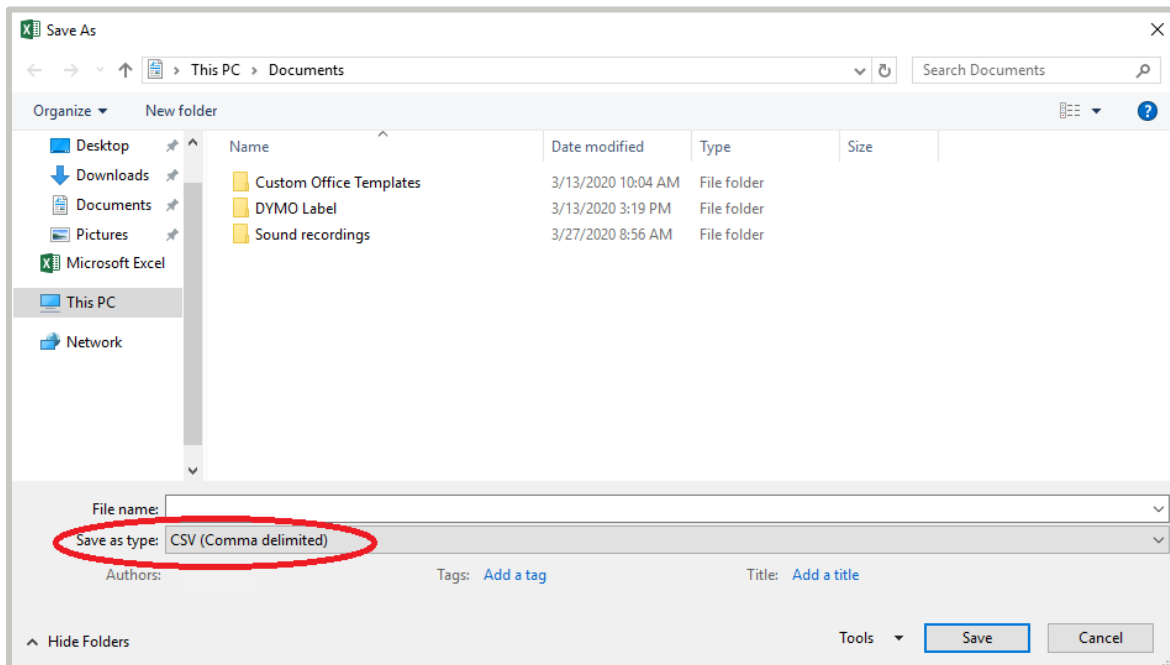
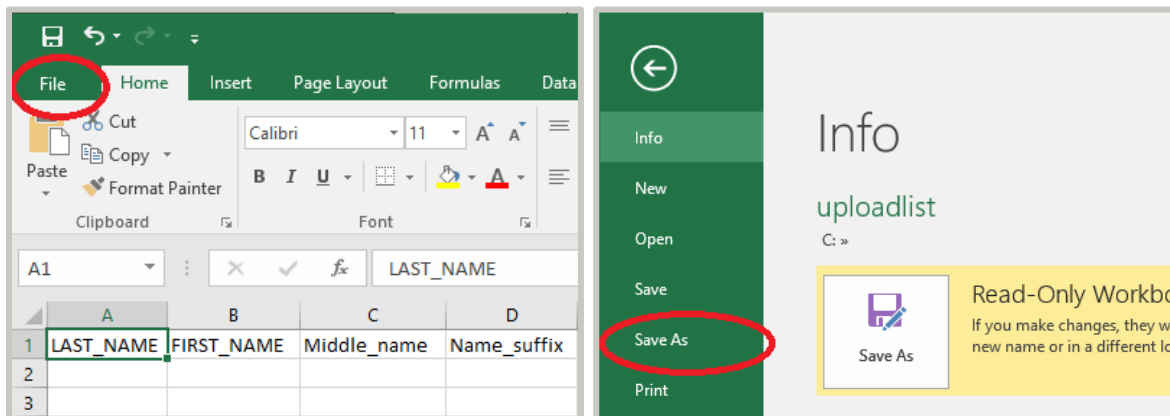


LAST_NAME	FIRST_NAME	Middle_name	Name_suffix	Mothers_first_name	Mothers_maiden_name	Unique_record_id	BIRTH_DATE

- A. Required Fields
 - LAST NAME
 - FIRST NAME
 - BIRTH DATE: Use the MM/DD/YYYY format
- B. Strongly Encouraged Fields (these aid in client matching in MIIC)
 - Middle name
 - Mother’s maiden name
- C. Optional Fields
 - Name suffix: JR, III, etc., for example
 - Mother’s first name

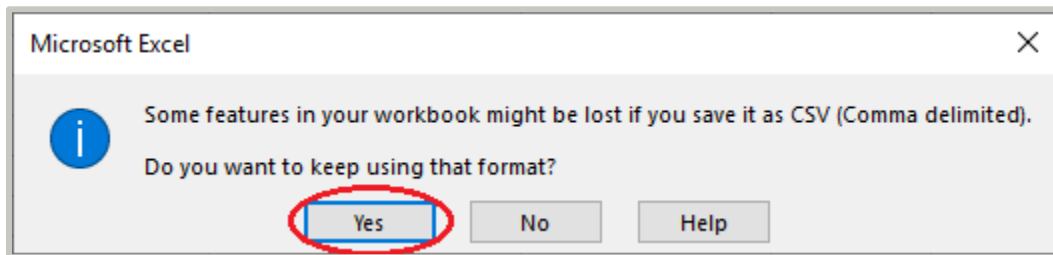
SETTING UP AND MANAGING LISTS IN MIIC

- 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.
4. Once the template is completed, save the file to your desktop or network where it can be easily accessed. In order to upload to MIIC, the file must be formatted as a .csv file. To save the Excel file as a .csv file, choose “File,” “Save As.” In the “Save As” type drop-down, choose CSV (comma delimited).

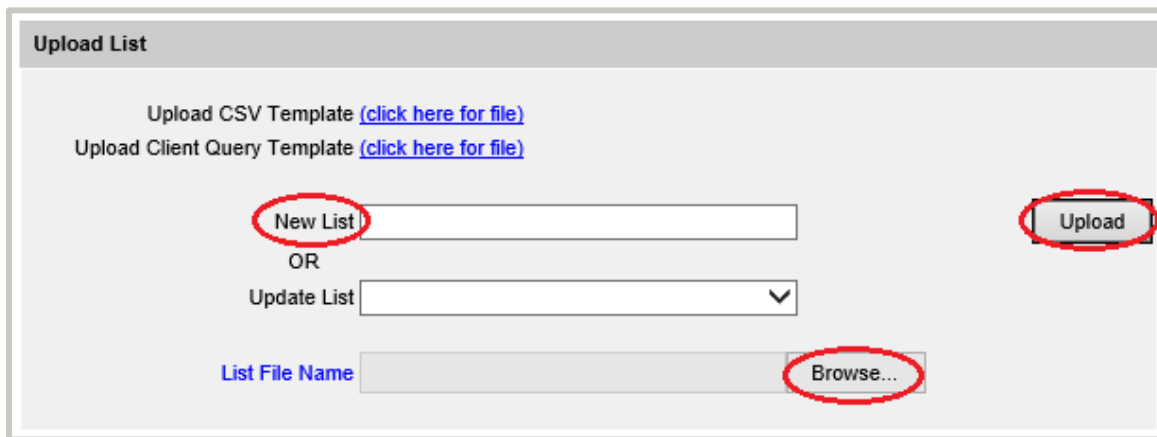


SETTING UP AND MANAGING LISTS IN MIIC

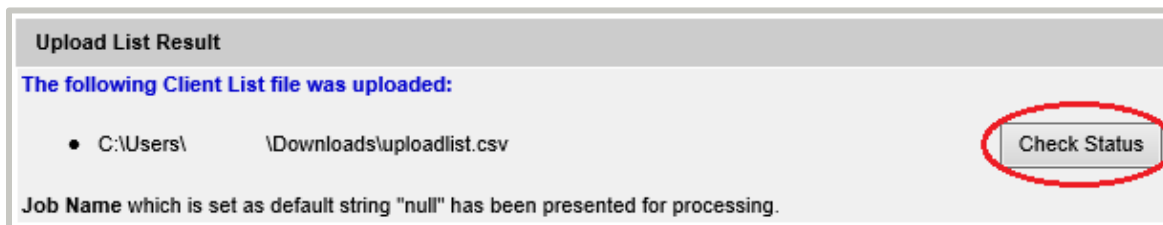
- You may receive a message asking if you want to keep the workbook in the .csv format; click "Yes." The CSV file is now ready for uploading into MIIC.



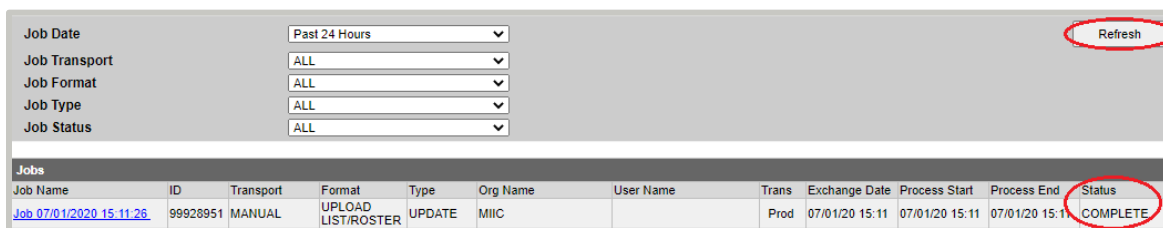
- On the "Upload List" page, enter a name for the new list, if desired. Click "Browse" to find the saved .csv file on your computer, and then click "Upload."



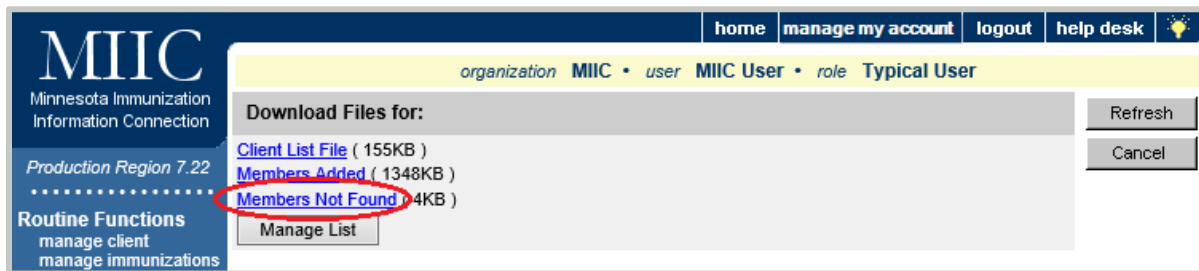
- After uploading, the file will begin processing. Click on the "Check Status" button.



- You can click on the "Refresh" button to check if the status is complete. However, the upload processing time may vary depending on the size of the list.
 - 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 “Members Not Found” where you can see if any members of your list were not found in MIIC.

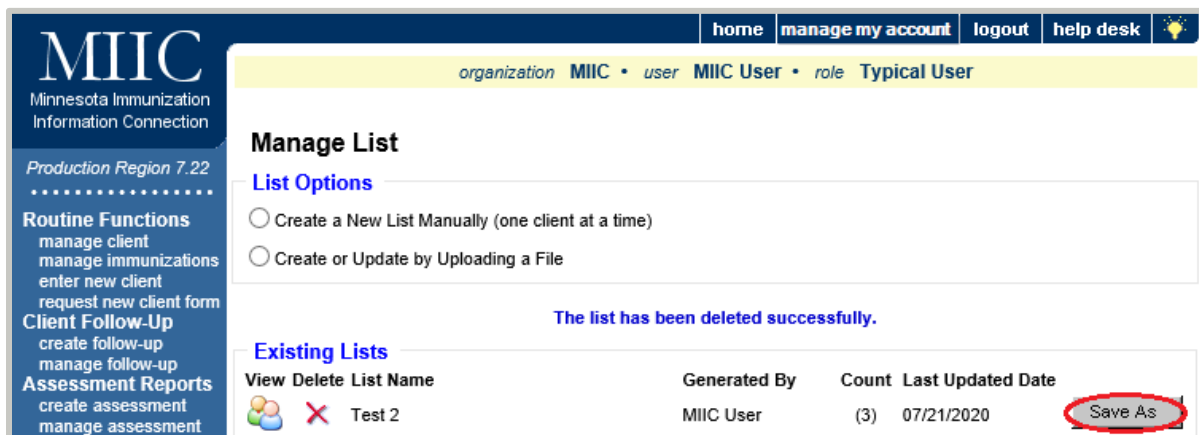


- A. If a submitted individual is not found it is likely because a direct match could not be made based on the demographic information provided.
 - Sample text from “Members Not Found”: “Submitted member LASTNAME, FIRSTNAME, 12/27/1985, was not found in MIIC or the demographics submitted were not complete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

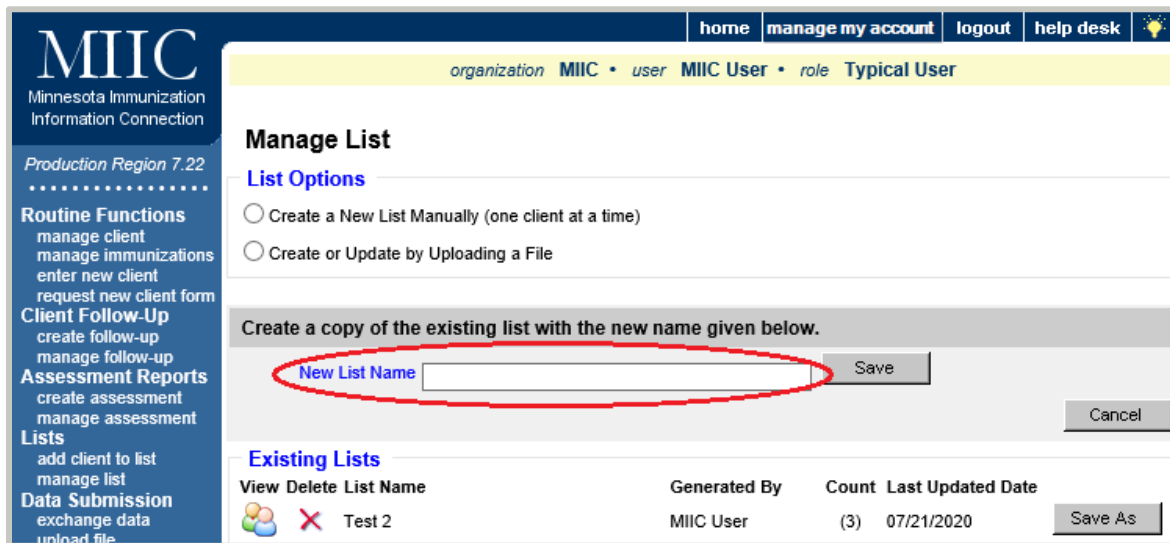
10. If there are members that weren’t found, you can add individuals to the list. Please refer to the [Managing Lists](#) section in this user guide for more information.

Create a Copy of an Existing List

1. 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.
 - A. 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.
2. From the “Manage List” screen, find the name of the list that you would like to copy or save as a new list. Click the appropriate “Save As” button.



3. In the box that appears, type in a “New List Name” and then click “Save.” Your new list will then appear below in the “Existing Lists” section.



- A. **Note:** After clicking **Save**, if you receive an error, are not able to save properly, or nothing happens, please check if your browser has compatibility view mode on. Please refer to the [Compatibility View Mode](#) user guidance for more information on how to check and turn it on.

Managing Lists

1. There are three actions for managing a list in MIIC:
 - A. Adding individuals to a list manually.
 - B. Deleting individuals from a list.
 - C. Deleting entire lists.

Adding individuals to a list manually

1. Choose “add client to list” from the “Lists” menu. This brings up the “Client Search Criteria” screen.



2. Search for a client in the Client Search Criteria. Please refer to [Client Search and Printing Immunization Records: MIIC User Guidance and Training Resources](https://www.health.state.mn.us/people/immunize/miic/train/clientsearch.html) (<https://www.health.state.mn.us/people/immunize/miic/train/clientsearch.html>) for more information on searching for clients in MIIC.
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. Add the individual to a list by choosing a list in the drop-down menu labeled “Please Pick a Report List.” Once the list is selected, click the “Add” button.

MIIC
Minnesota Immunization Information Connection

Production Region 7.22

Routine Functions
manage client immunizations
enter new client
request new client form

Client Follow-Up
create follow-up
manage follow-up

Assessment Reports
create assessment
manage assessment

Lists
add client to list

home Manage My Account logout help desk

organization MIIC • user MIIC User • role Typical User

MIIC ID: 10671819

Client Information

Client Name (First - MI - Last) DOB Gender Tracking Schedule
MICKEY K. MOUSE 12/30/1993 F ACIP

Comments {1 of 3} .. 02/06/2004 ~ Medical exemption: DTaP

Reports Print MIIC Immunization Report

Please Pick a Report List Add

History

Vaccine Group	Date Administered	Series	Vaccine [Trade Name]	Dose
DTP/aP	02/01/1994		DTaP,5 pertussis antigens [DAPTACEL ®]	
	04/01/1994	1 of 5	DTaP,5 pertussis antigens [DAPTACEL ®]	
	06/01/1994	2 of 5	DTAP/Polio/Hep B [Pediarix ®]	

A. **Note:** If the list is missing from the drop-down, the client has already been added to the list. Go back to “manage list” and check your list for the client you were trying to add.

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 and continue until all the individuals of interest are added.

Removing individuals from a list

1. To delete specific individuals from a list, select the view icon for the specific list (it looks like two people). This will take you to a screen with a list of all of the members.

home manage my account logout help desk

organization MIIC • user MIIC User • role Typical User

Manage List

List Options

Create a New List Manually (one client at a time)

Create or Update by Uploading a File

Existing Lists

View	Delete	List Name	Generated By	Count	Last Updated Date
		Test 2	MIIC User	(3)	07/21/2020

Save As

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- 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.).

The screenshot shows the MIIC interface with a list of individuals. The list has columns for Last Name, First Name, Middle Name, and Birth Date. The headings are circled in red. There are three individuals listed: DOG, DUCK, and MOUSE. The 'Remove From List' button is at the bottom left.

<input type="checkbox"/>	Last Name	First Name	Middle Name	Birth Date
<input type="checkbox"/>	DOG	GOOFY		08/16/1982
<input type="checkbox"/>	DUCK	DONALD	N	01/01/1944
<input type="checkbox"/>	MOUSE	MICKEY	K	12/30/1993

- 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).

The screenshot shows the same MIIC interface as above, but the checkbox next to 'DUCK' is checked. The 'Remove From List' button is circled in red.

<input type="checkbox"/>	Last Name	First Name	Middle Name	Birth Date
<input type="checkbox"/>	DOG	GOOFY		08/16/1982
<input checked="" type="checkbox"/>	DUCK	DONALD	N	01/01/1944
<input type="checkbox"/>	MOUSE	MICKEY	K	12/30/1993

Deleting lists

1. To delete an entire list, click the delete icon on the line of the list you want deleted. This icon is the red "X."

The screenshot shows the MIIC 'Manage List' page. The top navigation bar includes 'home', 'manage my account', 'logout', and 'help desk'. The user is logged in as 'MIIC User' with the role 'Typical User'. The page is titled 'Manage List' and has a 'List Options' section with two radio buttons: 'Create a New List Manually (one client at a time)' and 'Create or Update by Uploading a File'. Below this is the 'Existing Lists' section, which contains a table with the following data:

View Delete	List Name	Generated By	Count	Last Updated Date	
	Test 2	MIIC User	(3)	07/21/2020	Save As

MIIC Help

For assistance with using lists in MIIC, 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.

The screenshot shows the MIIC 'announcements' page. The top navigation bar includes 'home', 'manage my account', 'logout', and 'help desk' (circled in red). The user is logged in as 'MIIC User' with the role 'Typical User'. The page is titled 'announcements:' and contains the following list:

- NEW** 07/08/2020 ~ [MIIC release 7.22 is live](#)
- NEW** 03/23/2020 ~ [COVID-19 help desk phone suspension](#)
- NEW** 03/11/2020 ~ [MIIC release 7.21 is live](#)

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health.miichelp@state.mn.us
www.health.state.mn.us/people/immunize/miic

10/10/20

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