Managing Clients in MIIC

MIIC USER GUIDANCE TRAINING RESOURCE

All authorized users can view client information in the Minnesota Immunization Information Connection (MIIC). Some users can edit client information based on their user role and the type of organization they work on behalf of. This guide will walk through the basic steps of editing a client in MIIC and will address some frequently asked questions regarding a client's record. If you need access to edit client information in MIIC based on your role in your organization, contact your organization's MIIC Administrator or the MIIC Help Desk at health.miichelp@state.mn.us.

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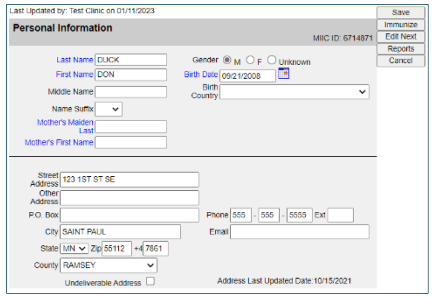
Getting started

Before you begin, please review the Client Search and Printing Immunization Records (www.health.state.mn.us/people/immunize/miic/train/clientsearch.pdf) user guidance to review how to effectively search for a client. Use the **manage client** function in the left-hand navigation bar to search for and view the client's demographics. This function will also allow you to edit client information. If the **manage client** function is not available for you, your user role does not allow you to edit client information.

Updating the "personal information" screen

When you find a client in MIIC, their name, address, phone number, and other information are sometimes outdated. For example, a client's last name may change due to marriage, divorce, adoption, etc. Organizations are encouraged to verify at least three details about a client before editing the MIIC record. For example, does first name, last name, and date of birth match? Can your client verify a previous name if the last name does not match?

Once you have verified that the record is a match for your client, update the client's record with any current or up-to-date information you have. **Do not edit MIIC records if you have not verified that they match your client's.** If your client has a common name, you may also need to verify the client's previous/current address and/or phone number.

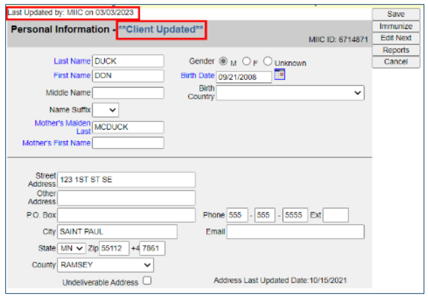


1. The following fields are available to be updated. Review your client's record and update the fields you have more current information for:
   - Last Name - Changing this field creates an alias, or AKA, for your client.
   - First Name - Changing this field creates an alias, or AKA, for your client.
   - Middle Name
   - Name Suffix
   - Mother's Maiden Last
   - Mother's First Name
   - Gender
   - Birth Date - Changing this field creates an alias, or AKA, for your client.
     - This field cannot be changed if MIIC has a birth certificate number on file from the Minnesota Office of Vital Records. If you feel that the birth date is incorrect and the field is grayed out, contact the MIIC Help Desk at health.miichelp@state.mn.us with the client's MIIC ID.
   - Race
   - Ethnicity
   - Address (Street Address, City, State, Zip, County)
     - If the address you have on file for a client is undeliverable, check the "Undeliverable Address" box. **Do not** fill in this field with **Needs Update**, **Bad Address**, **Undeliverable**, **etc**. Leave the details of the undeliverable address instead of deleting from MIIC. Keeping the historical address allows another point to verify the client's record before updating with the current address.
   - Phone
     - If the phone number you have on file for a client is no longer valid, you can delete it from MIIC. **Do not input a fake phone number, such as all 9's or all 0's**.
   - Email address

Note: Changing the client's first name, last name, and/or date of birth in MIIC will create an alias, or an AKA (also known as). You may still search for the client using the previous information, but users will be directed to only one record.

2. Once you've updated the information, click the **Save** button at the top right of the screen. This will update your client's record. Once the changes are saved successfully, the **Client Updated** text will appear next to the

Personal Information header. Above this header, it will also tell you when the record was last updated and which organization made the changes



Updating the client information tabs

Additional client information is located within the three tabs below the client's demographic information: Client Information, Address(es)/Contact(s), and Client Comments(s). You can click on each tab to see what information MIIC has and update information where applicable.

Client information

This tab is specific to the organization you are acting on behalf of. Learn more about determining this in the Using the Switch Organizations Function in MIIC (www.health.state.mn.us/people/immunize/miic/train/switchorgfunction.pdf) user guide.

1. Update the applicable fields below:
   - Chart number: This is the chart number or Medical Record Number specific to your organization.
   - Status: Review options carefully before saving changes.
     - Active: The person is considered an active client of your organization. The person's vaccination status will be considered when generating assessment reports (www.health.state.mn.us/people/immunize/miic/train/assess.html) and client follow-up (www.health.state.mn.us/people/immunize/miic/train/followup.html) cohorts.
     - Inactive: The person is no longer considered a client of your organization.
     - Deceased: The person is deceased. If you select this status, the record will be flagged as deceased, and no organizations in MIIC will be able to view it
   - Allow Reminder and Recall Contact?
     - Yes: The person consents to receiving mail, phone, and/or text communication from provider organizations, including public health agencies, when they are due or overdue for recommended vaccinations.
     - No: The person opts out of routine communization when they are due or overdue for recommended vaccinations.

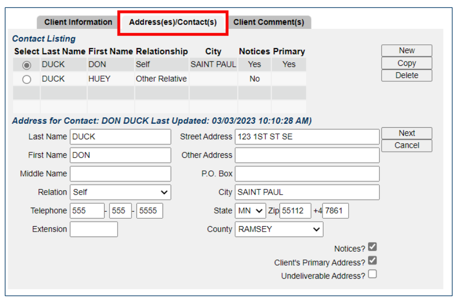
- Allow Sharing of immunization data?
  - Yes: The person consents to other organizations participating in MIIC and can view their record when the individual seeks services from another provider (for example, care at a local hospital, convenience clinic, etc.).
  - No: The person wants their MIIC record locked to your organization. No other organization participating in MIIC can view the person's record until the client requests it be unlocked.

Note: If a client's record is locked to your organization and the client is now requesting their record be unlocked, change the **Allow Sharing of Immunization data**? field from No to Yes. Select **Save**. The client's record is now unrestricted and accessible to other organizations participating in MIIC.

2. Click the **Save** button on the top right of the screen once you've updated the information, this will update your client's record. The **Client Updated** text will appear next to the **Personal Information** header once the changes are saved successfully. Above this header, it will also tell you when the record was last updated, and which organization made the changes.

Address(es)/Contact(s)

This tab contains relationship information for clients, such as former addresses, parent/guardian information, etc., and is viewable by all organizations with access to MIIC.



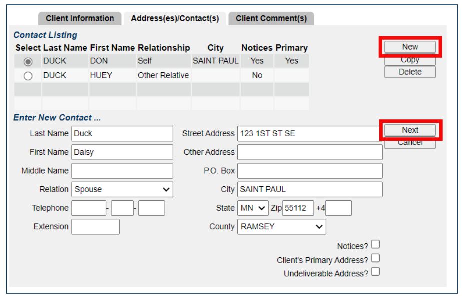
Editing contacts

1. Select the radio button to the left of the contact's last name. The details for that contact will be displayed below.
2. Update the contact's name, relation, phone number, and address.
3. Select **Next** and then select the **Save** button on the top right of the screen. If you select **Save** before you select **Next**, your changes will not be saved.

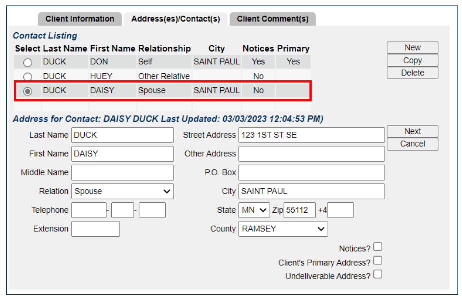
Adding contacts

1. Select **New** to the right of the contact listing.
2. Input the contact's information in the fields that are displayed below. Note the following checkmark boxes at the bottom right:
   - Client's Primary Address?: Check this box when the address for the contact is the client's primary address. Only one contact can be designated as the client's primary address.
   - Undeliverable Address?: Check this box when the address for the contact is undeliverable.

3. Select **Next** and then select the **Save** button on the top right of the screen. If you select **Save** before you select **Next**, your changes will not be saved.



4. The contact will now be added to the **Contact Listing** section. Please note that only four contacts will be displayed in MIIC.



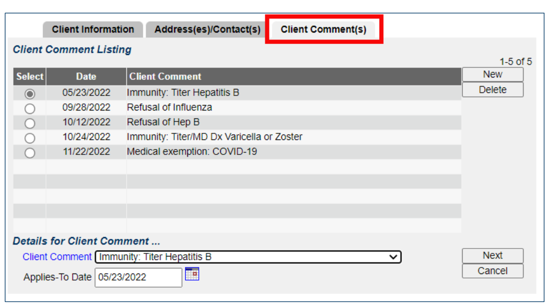
Deleting contacts

1. If there is a duplicate contact, or the contact information is no longer applicable, the contact can be deleted. Select the radio button to the left of the contact's last name.

2. Select "Delete" to the right of the "Contact Listing" section and then select the "Save" button on the top right of the screen.

Client comment(s)

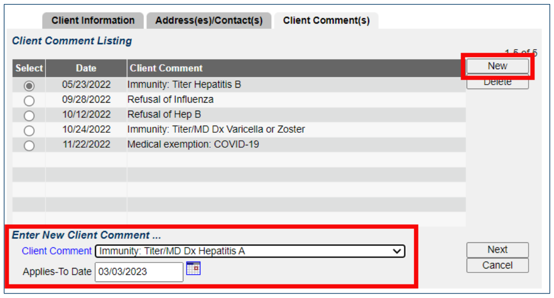
This tab lets you view and edit immunization-related comments, such as immunity by titer/history of disease, medical exemptions, and/or refusals. Information on this tab is viewable to all organizations with access to MIIC and will also display on the client's immunization history screen.



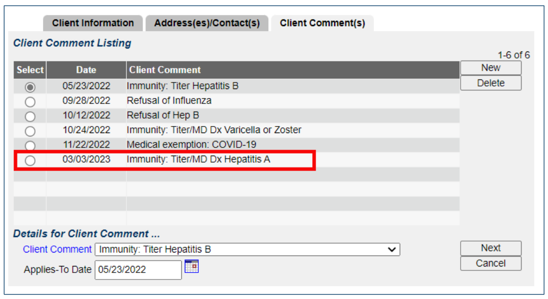
Adding a new comment

1. Click on the **New** button to the right of the **Client Comment Listing** section.

2. Choose the appropriate comment from the **Client Comment** dropdown menu and enter the applicable date, such as the date the titer was drawn or the date the client refused an immunization.

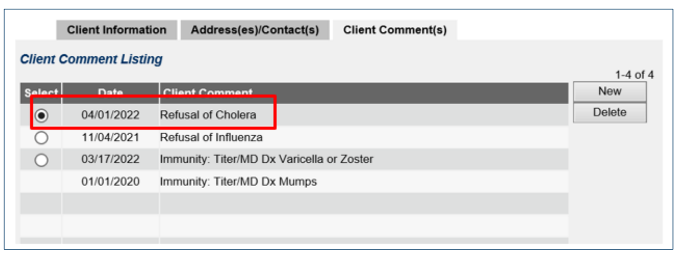


3. If you want to add another client comment, select the **Next** button to the right of the Client Comment dropdown and repeat the steps above.
4. Select the **Save** button on the top right of the screen when you are finished.



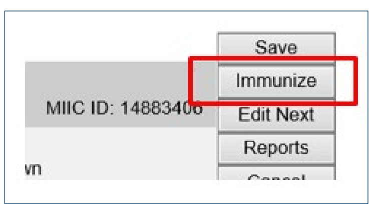
Deleting comments

1. Select the radio button to the left of the comment you'd like to delete.
2. Click **Delete** to the right of the comments and then select the **Save** button on the top right of the screen when you are finished.

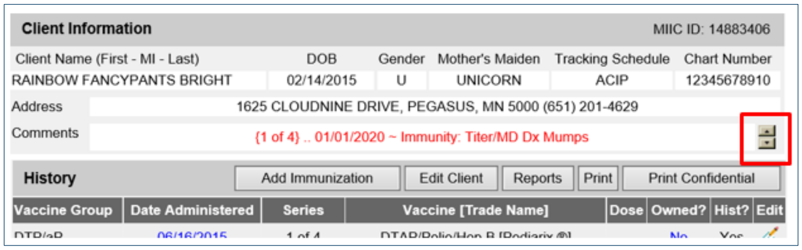


Viewing client comments on the immunization record

1. Select **Immunize** in the top right corner to view a client's immunization history screen.



2. To browse the comments on this screen, click on the up/down toggles to the right of the comments.



MIIC help

For assistance with managing clients, contact the MIIC Help Desk at health.miichelp@state.mn.us.

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