

# 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](mailto:health.miichelp@state.mn.us).

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### Getting started

Before you begin, please review the [Client Search and Printing Immunization Records \(www.health.state.mn.us/people/immunize/miic/train/clientsearch.pdf\)](http://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When you find a client in MIIC, their name, address, phone number, and other information are sometimes outdated.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.

## MIIC MANAGING CLIENTS IN MIIC

Personal Information

Last Updated by: Test Clinic on 01/11/2023

MIIC ID: 6714871

Last Name: DICK Gender: M F Unknown

First Name: DON Birth Date: 09/21/2009 Birth Country: [Dropdown]

Middle Name: [Dropdown]

Name Suffix: [Dropdown]

Mother's Maiden Last: [Dropdown]

Mother's First Name: [Dropdown]

Street Address: 123 1ST ST SE

City: SAINT PAUL State: MN Zip: 55112 County: RAMSEY

Phone: 555-555-5555 Email: [Text]

Undeliverable Address:  Address Last Updated Date: 10/15/2021

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](mailto: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](http://www.health.state.mn.us/people/immunize/miic/train/switchorgfunction.pdf) user guide.

- 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](http://www.health.state.mn.us/people/immunize/miic/train/assess.html) and [client follow-up](http://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 immunization 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.

The screenshot shows the 'Address(es)/Contact(s)' tab in the MIIC system. At the top, there are three tabs: 'Client Information', 'Address(es)/Contact(s)' (which is selected and highlighted with a red box), and 'Client Comment(s)'. Below the tabs is a 'Contact Listing' table with columns for 'Select', 'Last Name', 'First Name', 'Relationship', 'City', 'Notices', and 'Primary'. Two contacts are listed: DON DUCK (Self, SAINT PAUL, Yes, Yes) and DUCK HUEY (Other Relative, No, No). To the right of the table are buttons for 'New', 'Copy', and 'Delete'. Below the table is a detailed form for the selected contact, DON DUCK. The form includes fields for 'Last Name', 'First Name', 'Middle Name', 'Relation', 'Telephone', 'Extension', 'Street Address', 'Other Address', 'P.O. Box', 'City', 'State', 'Zip', and 'Country'. There are also checkboxes for 'Notices?', 'Client's Primary Address?', and 'Undeliverable Address?'. The 'Next' and 'Cancel' buttons are located at the top right of the form.

## 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.

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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.

The screenshot shows the 'Contact Listing' section of the MIIC interface. It includes a table with columns for 'Select', 'Last Name', 'First Name', 'Relationship', 'City', 'Notices', and 'Primary'. The first row is selected with a radio button. To the right of the table are buttons for 'New', 'Copy', and 'Delete'. Below the table is the 'Enter New Contact...' form with fields for Last Name, First Name, Middle Name, Relationship, Telephone, Extension, Street Address, Other Address, P.O. Box, City, State, Zip, and County. The 'Next' button is highlighted in red.

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

This screenshot shows the 'Contact Listing' section after a contact has been added. The contact 'DAISY DUCK' is now listed in the table and is selected with a radio button. The 'Delete' button is highlighted in red. Below the table, the 'Address for Contact: DAISY DUCK' form is visible, showing the same fields as in the previous screenshot.

### 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.

The screenshot shows the 'Client Comment(s)' section of the MIIC interface. It features a table with columns for 'Select', 'Date', and 'Client Comment'. The first row is selected with a radio button. To the right of the table are buttons for 'New' and 'Delete'. Below the table is the 'Details for Client Comment...' form with a dropdown menu for 'Client Comment' and a text field for 'Applies-To Date'.

### 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.

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Client Information | Address(es)/Contact(s) | Client Comment(s)

Client Comment Listing

Select	Date	Client Comment	New	Delete
<input checked="" type="radio"/>	05/23/2022	Immunity: Titer Hepatitis B		
<input type="radio"/>	09/28/2022	Refusal of Influenza		
<input type="radio"/>	10/12/2022	Refusal of Hep B		
<input type="radio"/>	10/24/2022	Immunity: Titer/MD Dx Varicella or Zoster		
<input type="radio"/>	11/22/2022	Medical exemption: COVID-19		

Enter New Client Comment ...

Client Comment: Immunity: Titer/MD Dx Hepatitis A

Applies-To Date: 03/03/2023

Next  
Cancel

- 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.
- Select the **Save** button on the top right of the screen when you are finished.

Client Information | Address(es)/Contact(s) | Client Comment(s)

Client Comment Listing

Select	Date	Client Comment	New	Delete
<input checked="" type="radio"/>	05/23/2022	Immunity: Titer Hepatitis B		
<input type="radio"/>	09/28/2022	Refusal of Influenza		
<input type="radio"/>	10/12/2022	Refusal of Hep B		
<input type="radio"/>	10/24/2022	Immunity: Titer/MD Dx Varicella or Zoster		
<input type="radio"/>	11/22/2022	Medical exemption: COVID-19		
<input type="radio"/>	03/03/2023	Immunity: Titer/MD Dx Hepatitis A		

Details for Client Comment ...

Client Comment: Immunity: Titer Hepatitis B

Applies-To Date: 05/23/2022

Next  
Cancel

## Deleting comments

- Select the radio button to the left of the comment you'd like to delete.
- 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.

Client Information | Address(es)/Contact(s) | Client Comment(s)

Client Comment Listing

Select	Date	Client Comment	New	Delete
<input checked="" type="radio"/>	04/01/2022	Refusal of Cholera		
<input type="radio"/>	11/04/2021	Refusal of Influenza		
<input type="radio"/>	03/17/2022	Immunity: Titer/MD Dx Varicella or Zoster		
<input type="radio"/>	01/01/2020	Immunity: Titer/MD Dx Mumps		

## Viewing client comments on the immunization record

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

MIIC ID: 14883406

Save  
Immunize  
Edit Next  
Reports  
Cancel

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

## MIIC MANAGING CLIENTS IN MIIC

Client Information						MIIC ID: 14883406	
Client Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Chart Number		
RAINBOW FANCYPANTS BRIGHT	02/14/2015	U	UNICORN	ACIP	12345678910		
Address 1625 CLOUDNINE DRIVE, PEGASUS, MN 5000 (651) 201-4629							
Comments (1 of 4) ... 01/01/2020 ~ Immunity: Titer/MD Dx Mumps							
History							
Add Immunization Edit Client Reports Print Print Confidential							
Vaccine Group	Date Administered	Series	Vaccine [Trade Name]	Dose	Owned?	Hist?	Edit
DTaP	06/16/2015	1 of 4	DTaP/Daliv/Men B (Daktary @)		No	Yes	

## MIIC help

For assistance with managing clients, contact the MIIC Help Desk at [health.miichelp@state.mn.us](mailto:health.miichelp@state.mn.us).

The screenshot shows the MIIC website interface. At the top right, there are navigation links: home, manage my account, logout, and help desk. Below these, the user's current session is displayed as organization MIIC, user MIIC User, and role Typical User. A section titled 'announcements' lists three items, each marked as 'NEW':

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

On the left side, there is a sidebar with the MIIC logo and the text 'Minnesota Immunization Information Connection'. Below the logo, it says 'Production Region 7.22' and 'Routine Functions' with sub-links for 'manage client' and 'manage immunizations'.

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