Setting Up and Managing Lists Transcript

Organizations use the MIIC list feature to track immunization histories and immunizations due for selected groups of individuals. The following video guide will go over how to set up and manage lists in MIIC.

To begin, log in to MIIC using your organization code, username, and password.

Next, find “manage lists”. Depending on your user role in MIIC, the left-hand navigation bar may look different for you. Find “manage list” under the list section or under the routine functions section.

Next is set up lists in MIIC. First, we will go over how to set up a new list in MIIC. There are three options for setting up a new list that we will go over. First is creating a new list manually, one client at a time. Next is create or update by uploading a file or CSV Template. The last is using the “save as” function to create a new copy of an existing list. This is only available if your organization has existing lists.

First, we will discuss setting up a new list manually. On the “Manage List” screen click on “Create a New List Manually (one client at a time)” in the “List Options” box. Enter in a unique name for the new list so it is easy to identify who is included in the list. This will create an empty list where you can manually add in clients. We will go over manually adding in clients later in this video. If you 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.

The second option is to create or update a list by uploading a file using a CSV template. Click on “Create or Update by Uploading a File” to go to the “Upload List” screen. You can use this function to add an entire group of individuals all at once.

This will take you to the upload list screen where you can download a copy of the CSV template if you don’t already have one. This will download a .zip file which you can open to find the CSV file. Please enter in the appropriate information for your group of clients in this spreadsheet. Do not add, delete, or change any of the pre-filled columns.

Once you have filled out the template, please save the file in the “CSV” format. Please refer to the full “Setting Up and Managing List” user guide for more detailed instructions on filling out and saving the CSV template file.

Once you have your CSV list file, you can upload it onto MIIC. On the “Upload List” screen, please enter in a unique name for your list in the “New List” text box. Click on the “Browse” button to select the file from your computer. Select the “Upload” button to upload the file.

The “Upload List Result” screen should now appear, and the file should begin processing. You can check the status of the processing by clicking on the “Check Status” button. This will bring you to the list of jobs for your organization.

You can click on the “Refresh” button to check on the current status. Once the status displays as “Complete”, you can click on the job name link to view specific details of your upload. If the status displays as “Error” or “Exception”, there may be errors in the file you uploaded. Check for special characters anywhere in the file, leading spaces, dates in the wrong format, etc. and reupload the file.

Click on the “Members Not Found” link to view clients that were not found in MIIC from your list and the reason why. These clients may need to be entered in manually. If you have a “Read Only” user role or cannot enter or edit new clients, please contact the MIIC Help Desk at health.miichelp@state.mn.us or call our help desk number.

To create a copy of an existing list, you can use the “Save As” function in MIIC. On the “Manage List” screen, find the name of the list that you would like to copy or save as a new list. Click on the “Save As” button and a “New List Name” box should appear.

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. 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.

Now that we’ve gone over how to set up lists in MIIC, we will now go over how to manage your existing lists. Any user under your organization has access and can manage the organization’s lists. There are three actions for managing a list: Adding individuals to a list manually, Deleting individuals from a list, Deleting entire lists.

In order to add individuals to a list manually, in the left-hand navigation bar find the “add client to list” function in the same section that you found the “manage list” function. This will bring up the “Client Search Criteria” page. Enter in your client’s information to search for them in MIIC using the minimum requirements of a last name, first name, and date of birth.

Once an individual is selected, the “Client Information” page will appear with the client’s immunization history, recommended vaccines, or any contraindications to vaccination. Verify that this is the correct client. To add the client to a list, click on the drop-down box in the “Reports” section and select the appropriate list you want to add to. Click the “Add” button to finish and you will receive a message saying that the “Client has been added to the selected list”. Repeat this process for other clients you wish to add. 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.

In order to delete individuals from a list, you will need to navigate back to the “Manage List” screen that we opened at the beginning of this video. On this screen, find the list that you want to delete individuals from under the “Existing Lists” section of the page. Click on the view icon that resembles two people to open up the member list.

Depending on how large the list is, you can click on the different headers to sort the member list by last name, first name, middle name, or birth date. In order to delete members off the list, click on the check boxes to the left of the client names to select them. Once all the members are selected, you can click on the “Remove From List” button at the bottom of the screen to remove them.

In order to delete an entire list, navigate back to the "Manage List" screen and find the list you want to delete in the "Existing Lists" section of the page. There should be a red "X" icon to the left of the list name which you can click to delete the entire list.

For a PDF guide version and further assistance, go to the link provided on this slide.

Minnesota Department of Health

health.miichelp@state.mn.us

www.health.state.mn.us/miic

5/7/2021

To obtain this information in a different format, call: 651-201-5414.