MIIC Client Follow-Up Transcript

This guide describes how to use the client follow-up feature in the Minnesota Immunization Information Connection (MIIC). The purpose of the client follow-up feature is to identify clients who are recommended or overdue for selected immunizations and to facilitate follow-up with these individuals using a process called reminder/recall. This feature allows users to generate: client report listing immunizations the client has received, mailing labels, a mail merge output, a contact list, and a COVID-19 doses report. These tools can be used to improve data for your organization in MIIC and client and population vaccination rates.

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

In the left-hand side menu bar, choose "create follow-up" under "Client Follow-Up." Then, choose a method for creating a follow-up cohort: "Create manually" is the most commonly used option and will help you create a follow-up cohort from scratch. Once selected, you can choose a variety of age ranges that will produce a cohort, listing individuals that MIIC associates with your organization or area. "Create from an existing list" allows you to choose from any list you already have created in MIIC. Find more information on how to create a list in the Using Lists in MIIC user guide.

Select "Create Manually" on the "Create Client Follow-Up" page.

In the "Age Range" section, select the age range information. Choose whether the age range will be measured in months or years. Enter a "Beginning Age" and a "Through Ending Age". The report will only look at the clients who are between the beginning age and the ending age. Enter an "Age as of Date" from which the report will run. The current date will be used if no date is entered.

Once the age range is entered in, MIIC will display the range of birthdates that this follow-up will look at on the far right. For instance, the example below would show all adults age 55 through 60 years old (beginning age 55, ending age 60), as of February 10, 2015 (age as of date). Users who run monthly follow-up reports may find it helpful to run the report the same day every month to ensure you are getting reports for the current cohort of clients. For cohorts you have previously done follow-up on, you can check if they still have overdue of recommended vaccines by setting the "Age as of Date" to the original date used to view the clients.

In the "Client Associations" box, local public health users have an additional option to conduct follow-up on residents of selected counties.

You can choose which clients to include in the follow-up report from the options listed below which include clients associated with your organization, clients residing in selected counties, and clients within your organization or residing in selected counties.

Parent organizations have an additional option to select clients from associated sites (which are set up as separate organizations in MIIC) for follow-up.

Similar to local public health users, you can choose which clients to include in the follow-up report from the options listed below which include clients associated with your organization, clients residing in selected organizations, and clients within your organization or residing in selected counties.

In the "Follow-Up Type" section, select the "Follow-Up Type" from the available options listed below. The definitions of "Overdue" and "Recommended" are based on guidelines determined by the Advisory Committee on Immunization Practices (ACIP). Overdue selects all clients, in the specified cohort, who are overdue/late for vaccines. Recommended selects all clients, in the specified cohort, who are recommended/due for vaccines. Overdue or recommended selects all clients, in the specified cohort, who are overdue/late or recommended/due for vaccines. All clients regardless of vaccination status selects all clients in the specified cohort. This will include clients that are due, overdue, and up to date for vaccines. This report will include all people that meet the criteria used in the client follow-up creation. It is important to note that selecting this option will cause the “Vaccine Type” section to disappear and the user will not be able to select vaccine groupings, individual vaccines, or use the COVID-19 function.

Please note that the client follow-up feature can only make calculations based on the vaccine information that is in MIIC. Missing information will affect the results of these cohorts. Select the “Vaccine Type” for the cohort of interest from the two available options above. We will go over the process for both options.

For the “Vaccine Grouping(s) and/or Individual Vaccines(s)” option, select the vaccines to be included in the report. There are a few ways to select vaccines to include in the report including the child vaccines grouping, the adolescent vaccines grouping, individually selecting vaccines, or selecting all vaccines.

For the COVID-19 option, select the combination of COVID-19 vaccines and doses that is desired for the report. Currently, the Vaccine Group dropdown box only includes COVID-19. However, additional vaccine group options may be added in the future. The Vaccine [Trade Name] dropdown includes all active COVID-19 vaccine products. This field is optional and can be used to do product specific follow-up. The Dose(s) Received dropdown allows the user to do follow-up for clients who have received a certain number of doses of COVID-19 vaccine. The dropdown options change depending on which vaccine product selected and will only display 0 if no vaccine product is selected.

Please note, the dose(s) received box MUST have a value selected.

Once you have selected your vaccine type options, enter a name for the follow-up report and select the “Create Follow-Up” button to continue. This will bring up the “Manage Client Follow-Up” page.

On the “Manage Client Follow-Up” screen, select the “Refresh” button periodically until the status of the report displays. You may browse to other areas of MIIC while you are waiting for the cohort to process. If the status displays “Warning,” this means that you requested a large report. MIIC will still process this cohort, but it may take a while. In order to proceed, select the view icon that looks like two people. A pop-up message will appear. Select “OK” to continue processing or select “Cancel” and then the delete icon, the red “X,” on the “Manage Client Follow-Up” page to cancel the request. Please note, **it is common for the generated cohort to contain less people than the initial estimate provided from the ‘Warning’ message.**

If you decide to continue processing, click on the “Refresh” button until the status displays “Attention.” Similarly, select the view icon again and another pop-up message will appear. Click on “OK” to proceed. Once the status displays “Ready,” select the view icon to display the list of clients. You are free to navigate away from this page and do other work in MIIC work while you are waiting for the cohort to generate.

View the clients who fit your selected criteria. You can sort the list by selecting a column name and sorting direction. You can also add a second sorting criteria by selecting the red plus sign (+). You can sort clients by the fields below. If you have a very large list of clients, it may be easier to use the “Contact List” feature, which is described later in this video.

If you want to view a single client’s immunization record, simply select their last name and their MIIC record will open in a new window. Any changes that you make to the data at this point will not show up in the cohort until the next day. If you decide to clean up your data, please check MIIC again the next day to check your cohorts.

Some records may be color coded based on their address information. The colors are as follows: Red means no contact. The client has opted out of Reminder and Recall contact. Orange means undeliverable. The client’s address is marked as undeliverable. Yellow means insufficient address. The client's address may not be correct due to missing or incorrect address information, preventing it from successfully sending through postal mail.

Modify the list as needed by selecting the checkboxes next to each name and selecting either “No Reminder” or “Not our Client” at the bottom of the screen. Select “No Reminder” for clients you want to remove from this follow- up cohort. This keeps the client active to your organization but removes them from the report and outputs generated from the report. Select “Not our Client” for clients you no longer serve. Only select this if you are certain that the client is no longer a client at that organization. This selection removes the association between the client and the organization. In order for clients to be associated with that organization again, the association needs to be manually re-activated in MIIC or the client needs to receive a new immunization from that organization.

You can also use the below buttons to select larger groups of clients. These include select all this page, de-select all this page, select all, and de-select all. Once the follow-up cohort is defined, select the “View/Create Output” button at the top right. This will take you to a new page.

From this new page, you can select from the following output options: Client Report, Mailing Labels, Mail Merge, Contact List, and COVID-19 Doses Report. Select “Generate Output” to create your selected reports which will appear in the “Generated Reports” section below. You can click on the “Refresh” button until the status displays as “Ready”. You may work in other areas of MIIC or come back later to access the reports. Once the status displays “Ready”, select the view icon that looks like a document to open the report**. The outputs will generate faster if they are processed one at a time.**

The client report will include a section for each selected client with a list of all vaccines that are included in this client follow-up. There are three label options that may appear near the name of each immunization: the word “Needs” indicates that the client is recommended or overdue for that immunization. **Please note, “NEEDS” will not display for COVID-19 at this time**. Exempt indicates that the client has a medical exemption comment in MIIC for the indicated vaccine. Immune indicates that the client has an immunity comment in MIIC for the indicated vaccine.

Additionally, there are two other labels that may appear: NV indicates that the immunization is not valid. Immunizations are determined to be not valid when the client was not old enough to receive the immunization or not enough time elapsed between doses. A Blank space to the left of the immunization name indicates that the client is not currently recommended and/or overdue for that immunization.

Please note for the Td/Tdap row, an asterisk next to the date indicates a Tdap vaccination. This PDF can be printed and used as a tracking sheet. Once printed, the “Reminder Sent” box can be checked to indicate that a reminder has been sent to that client, and the “Remove Client” box can be checked to remind you to remove the client association in MIIC.

Select the “Mailing Labels” option under “Client Report” to open a PDF of client mailing labels. The PDF can be printed directly to a common 3 inch by 10-inch label sheet that you can use for mailings. The number above the client’s name on each label is the MIIC client ID number. This number may help identify clients in case there is returned mail. Please note, the labels cannot be edited. Clients who have opted out of reminder/recall contact or have an undeliverable address will not appear on this output.

Select the "Mail Merge" option under "Client Report" for mail merge information. When selected, you have the option to save this file to your computer as a Microsoft Excel file or open immediately in Microsoft Excel. You can pull your mail merge information from this Excel file for use in a Microsoft Word document. You can customize the file by adding columns to get the names to show on the envelope or label precisely the way you need them to display. Mail merge contains MIIC ID, last name, first name, address, other address field, PO box, city, state, ZIP code, area code, phone number, and email address. Please note, if you choose to open the file immediately instead of saving the file and then opening, you will have to save the file to your computer to access it in the future without going back into MIIC and accessing the report. Clients who have opted out of reminder/recall contact or have an undeliverable address will not appear on this output.

Select the "Contact List" option under "Client Report" for a list of client contact information. When selected, you have the option to save this file to your computer as a Microsoft Excel file or open it immediately in Microsoft Excel. The Excel spreadsheet includes the same information that was displayed on the client follow-up screen. The spreadsheet makes it easy to search for and sort a large lists of clients. The contact list contains a record number, last name, first name, date of birth, most recent shot date, provider, city, state, ZIP code, area code, phone number, email address, undeliverable address indicator, and contact indicator of all clients that were in the cohort.

Select the "COVID-19 Doses Report" option under "Client Report" for information on the COVID-19 doses the clients in the cohort have received. When selected, you have the option to save this file to your computer as a Microsoft Excel file or open it immediately in Microsoft Excel. This Excel spreadsheet includes MIIC ID, last name, first name, date of birth, COVID-19 series complete date, the next recommended COVID dose date, and up to three COVID-19 doses each client in the cohort has received. Vaccination date and product is listed for each dose in the report. Product information will be left blank for unspecified COVID-19 doses. Please note, this output is **only** available when the COVID-19 function is used for Vaccine Type in cohort creation.

For the pdf guide version and more assistance, go to the link provided in this slide.

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