

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](http://www.health.state.mn.us/people/immunize/miic/train/clientsearch.pdf) (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When you find a client in MIIC, sometimes their name, address, phone number and other information is outdated.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? If the last name does not match, can your client verify a previous name?

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 it is a match to your client.** 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

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

Personal Information		MIIC ID: 6714871
Last Name <input type="text" value="DUCK"/>	Gender <input checked="" type="radio"/> M <input type="radio"/> F <input type="radio"/> Unknown	Save
First Name <input type="text" value="DON"/>	Birth Date <input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text" value="09/21/2008"/>	Immunize
Middle Name <input type="text"/>	Birth Country <input type="text"/>	Edit Next
Name Suffix <input type="text"/>		Reports
Mother's Maiden Last <input type="text"/>		Cancel
Mother's First Name <input type="text"/>		
<hr/> Street Address <input type="text" value="123 1ST ST SE"/>		
Other Address <input type="text"/>		
P.O. Box <input type="text"/>	Phone <input type="text" value="555"/> - <input type="text" value="555"/> - <input type="text" value="5555"/> Ext <input type="text"/>	
City <input type="text" value="SAINT PAUL"/>	Email <input type="text"/>	
State <input type="text" value="MN"/> Zip <input type="text" value="55112"/> +4 7861		
County <input type="text" value="RAMSEY"/>		
Undeliverable Address <input type="checkbox"/> 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 with the MIIC ID for the client.
 - Birth Country
 - 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 the phone number 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 there will only be one record that users will be directed to.

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.

The screenshot shows the 'Personal Information' form in MIIC. At the top, it says 'Last Updated by: MIIC on 03/03/2023' and 'Client Updated*'. The form includes fields for:

- Last Name: DUCK
- First Name: DON
- Birth Date: 09/21/2008
- Gender: M (selected)
- Mother's Maiden Last: MCDUCK
- Address: 123 1ST ST SE, SAINT PAUL, MN 55112

 On the right side, there are buttons for 'Save', 'Immunize', 'Edit Next', 'Reports', and 'Cancel'. The MIIC ID is 6714871.

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

The screenshot shows the 'Client Information' tab selected. It contains:

- Chart #: [Empty field]
- Status: Inactive (dropdown menu)
- Allow Reminder and Recall Contact?: Yes (dropdown menu)
- Allow Sharing of Immunization Data?: Yes (dropdown menu)
- Opt-Out: NA (dropdown menu)

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) (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 individual is considered an active client of your organization. The individual’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 \(www.health.state.mn.us/people/immunize/miic/train/followup.html\)](http://www.health.state.mn.us/people/immunize/miic/train/followup.html) cohorts.

- Inactive – The individual is no longer considered a client of your organization.
- Deceased – The individual is deceased. If you select this status, the record will be flagged as deceased and no organizations in MIIC will be able to view this individual’s record.
- Allow Reminder and Recall Contact?
 - Yes - The individual 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 individual opts out of routine immunization when they are due or overdue for recommended vaccinations.
- Allow Sharing of immunization data?
 - Yes - The individual consents to other organizations participating in MIIC being able to view their record when the individual seeks services from another provider (for example, seeking care at a local hospital, convience clinic, etc.).
 - No – The individual wants their MIIC record locked to your organization. No other organization participating in MIIC can view the individual’s record until the client requests that 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.

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The screenshot shows the 'Address(es)/Contact(s)' tab in the MIIC interface. At the top, there are three tabs: 'Client Information', 'Address(es)/Contact(s)' (which is highlighted with a red box), and 'Client Comment(s)'. Below the tabs is a 'Contact Listing' section with a table:

Select	Last Name	First Name	Relationship	City	Notices	Primary
<input checked="" type="radio"/>	DUCK	DON	Self	SAINT PAUL	Yes	Yes
<input type="radio"/>	DUCK	HUEY	Other Relative		No	

Below the table is an 'Address for Contact: DON DUCK Last Updated: 03/03/2023 10:10:28 AM' section. It contains several input fields: Last Name (DUCK), First Name (DON), Middle Name, Relation (Self), Telephone (555-555-5555), Extension, Street Address (123 1ST ST SE), Other Address, P.O. Box, City (SAINT PAUL), State (MN), Zip (55112), and County (RAMSEY). There are also checkboxes for 'Notices?' (checked), 'Client's Primary Address?' (checked), and 'Undeliverable Address?' (unchecked). Buttons for 'Next' and 'Cancel' are located on the right side 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 display 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 display 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.

The screenshot shows the 'Address(es)/Contact(s)' tab in the MIIC interface. At the top, there are three tabs: 'Client Information', 'Address(es)/Contact(s)' (which is highlighted with a red box), and 'Client Comment(s)'. Below the tabs is a 'Contact Listing' section with a table:

Select	Last Name	First Name	Relationship	City	Notices	Primary
<input checked="" type="radio"/>	DUCK	DON	Self	SAINT PAUL	Yes	Yes
<input type="radio"/>	DUCK	HUEY	Other Relative		No	

Below the table is an 'Enter New Contact ...' section. It contains several input fields: Last Name (Duck), First Name (Daisy), Middle Name, Relation (Spouse), Telephone, Extension, Street Address (123 1ST ST SE), Other Address, P.O. Box, City (SAINT PAUL), State (MN), Zip (55112), and County (RAMSEY). There are also checkboxes for 'Notices?' (unchecked), 'Client's Primary Address?' (unchecked), and 'Undeliverable Address?' (unchecked). Buttons for 'New', 'Copy', and 'Delete' are located on the top right, and buttons for 'Next' and 'Cancel' are located on the right side of the form.

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

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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)', and 'Client Comment(s)'. The 'Address(es)/Contact(s)' tab is active. Below the tabs is a 'Contact Listing' section with a table. The table has columns for 'Select', 'Last Name', 'First Name', 'Relationship', 'City', and 'Notices Primary'. There are three rows of data. The second row, 'DUCK DAISY Spouse SAINT PAUL No', is highlighted with a red box. To the right of the table are buttons for 'New', 'Copy', and 'Delete'. Below the table is a section titled 'Address for Contact: DAISY DUCK Last Updated: 03/03/2023 12:04:53 PM'. This section contains various input fields for contact information: Last Name (DUCK), First Name (DAISY), Middle Name, Relation (Spouse), Telephone, Extension, Street Address (123 1ST ST SE), Other Address, P.O. Box, City (SAINT PAUL), State (MN), Zip (55112), and County (RAMSEY). There are also checkboxes for 'Notices?', 'Client's Primary Address?', and 'Undeliverable Address?'. At the bottom right of this section are 'Next' and 'Cancel' buttons.

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 is where you can 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)' tab in the MIIC system. At the top, there are three tabs: 'Client Information', 'Address(es)/Contact(s)', and 'Client Comment(s)'. The 'Client Comment(s)' tab is active. Below the tabs is a 'Client Comment Listing' section with a table. The table has columns for 'Select', 'Date', and 'Client Comment'. There are five rows of data. The first row, '05/23/2022 Immunity: Titer Hepatitis B', is selected. To the right of the table are buttons for 'New' and 'Delete'. Below the table is a section titled 'Details for Client Comment ...'. This section contains a dropdown menu for 'Client Comment' (Immunity: Titer Hepatitis B) and a date field for 'Applies-To Date' (05/23/2022). At the bottom right of this section are 'Next' and 'Cancel' buttons.

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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The screenshot shows the 'Client Comment Listing' interface. At the top, there are tabs for 'Client Information', 'Address(es)/Contact(s)', and 'Client Comment(s)'. Below the tabs is a table with columns 'Select', 'Date', and 'Client Comment'. The table contains five rows of data. To the right of the table are 'New' and 'Delete' buttons. Below the table is a form titled 'Enter New Client Comment ...' with a dropdown menu for 'Client Comment' (set to 'Immunity: Titer/MD Dx Hepatitis A') and a date field for 'Applies-To Date' (set to '03/03/2023'). To the right of the form are 'Next' and 'Cancel' buttons.

Select	Date	Client Comment
<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

3. If you would like to add in 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.

The screenshot shows the 'Client Comment Listing' interface. The table now has six rows, with the last row highlighted in red: '03/03/2023 Immunity: Titer/MD Dx Hepatitis A'. Below the table is a form titled 'Details for Client Comment ...' with a dropdown menu for 'Client Comment' (set to 'Immunity: Titer Hepatitis B') and a date field for 'Applies-To Date' (set to '05/23/2022'). To the right of the form are 'Next' and 'Cancel' buttons.

Select	Date	Client Comment
<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

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.

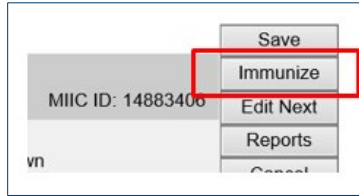
The screenshot shows the 'Client Comment Listing' interface. The table has four rows. The first row, '04/01/2022 Refusal of Cholera', is highlighted in red. To the right of the table are 'New' and 'Delete' buttons.

Select	Date	Client Comment
<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

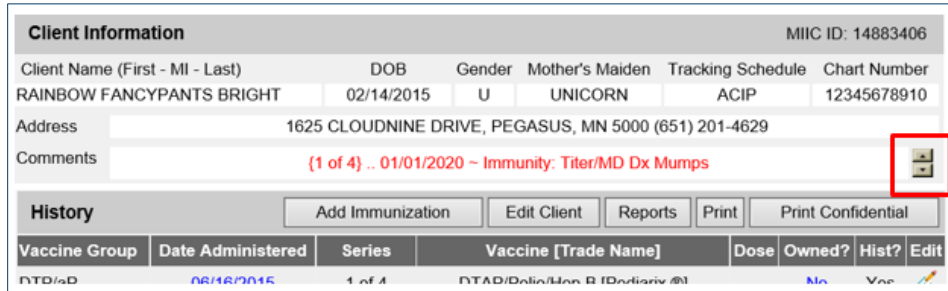
Viewing client comments on the immunization record

1. Select “Immunize” in the top right corner to view a client’s immunization history screen.

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2. To look through 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
PO Box 64975, St. Paul, MN 55164
651-201-5207
health.miichelp@state.mn.us
www.health.state.mn.us/immunize/miic

07/06/2023

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