

# Setting Up and Managing Lists

## MIIC USER GUIDANCE TRAINING RESOURCE

The following guide describes instructions on setting up and managing lists in MIIC. Organizations use the MIIC list feature to track immunization histories and immunizations due for selected groups of individuals.

If you are interested in using our “Client Query” function, please refer to the [Minnesota Immunization Information Connection \(MIIC\) Submit Client Query User Guide \(www.health.state.mn.us/people/immunize/miic/data/clientquery.pdf\)](http://www.health.state.mn.us/people/immunize/miic/data/clientquery.pdf).

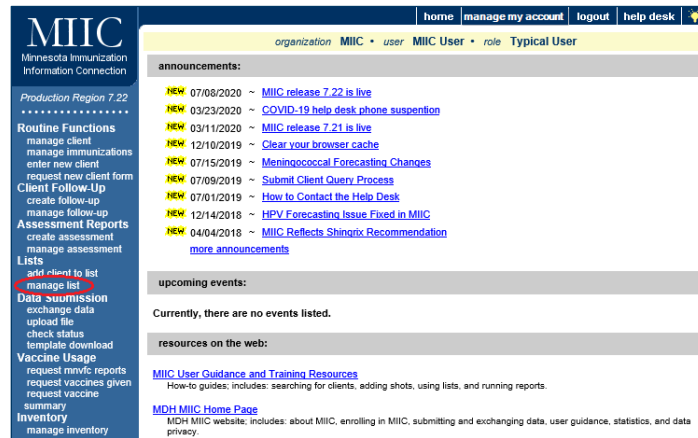
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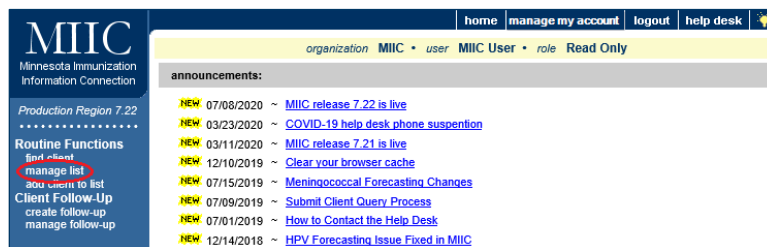
## Getting started

1. Log into MIIC using your organization code, username, and password.
2. Depending on your role in MIIC, the left side menu bar may look different. Find and select the “manage list” button.
  - Typical user

## SETTING UP AND MANAGING LISTS IN MIIC



- Read only user



## Setting up a new list

1. There are three options for setting up a new list:
  - Create a new list manually (one client at a time)
  - Create or update by uploading a file (CSV Template)
  - Using the “save as” function to create a new copy of an existing list.

Note: This option is only available if your organization has created existing lists.

## Create a new list manually (one client at a time)

1. To create a new list manually, choose “Create a New List Manually.” Enter a name for the new list, and click “Save.”

Note: Be specific in naming so you can know who is included in that particular list. Examples include: “Class of 2016,” “Kindergarten 2013-2014” or “Two Year Olds.” Also, every list must have a unique

name. Organizations are not allowed to have two lists with the same exact case-sensitive name (e.g., MIIC List” and “miic list” would be considered different).

2. To add individuals to the new list, please refer to the [Managing Lists](#) section in this user guide.

## Create or update by uploading a file (CSV template)

The CSV template provides an easy and efficient way to create lists of individuals in MIIC. Instead of manually searching for individual clients and adding them to a list, an entire group can be added to a MIIC list at once.

1. To create or update by uploading a list, choose “Create or Update by Uploading a File.” If you have already created your CSV template, go to Step 6.

View	Delete	List Name	Generated By	Count	Last Updated Date	
		Test 2	MIIC User	(3)	07/21/2020	<button>Save As</button>

2. On the “Upload List” page, click on the “Upload CSV Template” download link. This will open a .zip file which you can open to find a Microsoft Excel comma-separated value (CSV) file titled “uploadlist”. Open the .csv file.

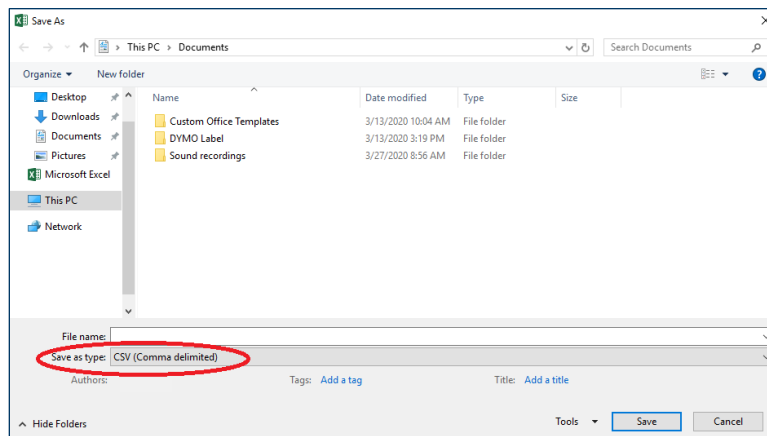
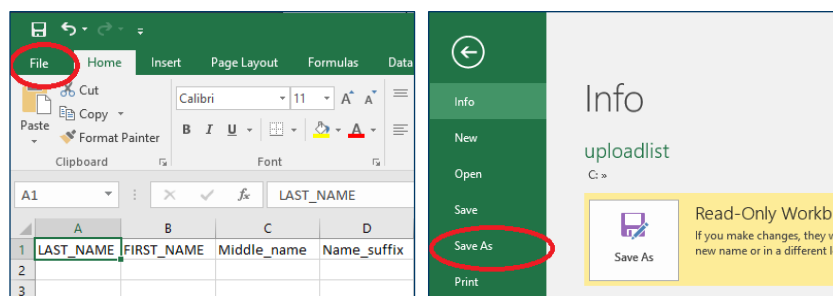
Note: If you are interested in using our “Client Query” function, please refer to [Minnesota Immunization Information Connection \(MIIC\) Submit Client Query User Guide](#) ([www.health.state.mn.us/people/immunize/miic/data/clientquery.pdf](http://www.health.state.mn.us/people/immunize/miic/data/clientquery.pdf)).

3. Fill in the template rows for each individual to be included on the list. **Do not re-arrange, add, or delete any columns.**

	LAST_NAME	FIRST_NAME	Middle_name	Name_suffix	Mothers_first_name	Mothers_maiden_name	Unique_record_id	BIRTH_DATE
2								
3								
4								
5								
6								
7								

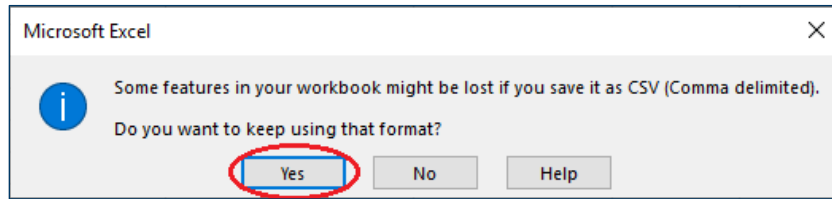
## SETTING UP AND MANAGING LISTS IN MIIC

- Required fields:
    - LAST NAME
    - FIRST NAME
    - BIRTH DATE: Use the MM/DD/YYYY format
  - Strongly encouraged fields (these aid in client matching in MIIC):
    - Middle name
    - Mother's maiden name
  - Optional fields:
    - Name suffix: JR, III, etc., for example
    - Mother's first name
  - Unique record identifier: The number that your internal system uses to uniquely identify a person. It may be a member ID, chart number, medical record number, or student ID. During the matching process, MIIC will store this unique identifier for your organization, which will make subsequent matching more accurate. **However, if you think your unique number for a person will change, then we encourage you to NOT use this field, as MIIC will try to match on the old unique number.** Do not include other fields that are not listed above.
4. Once the template is completed, save the file to your desktop or network where it can be easily accessed. In order to upload to MIIC, the file must be formatted as a .csv file. To save the Excel file as a .csv file, choose "File," "Save As." In the "Save As" type drop-down, choose CSV (comma delimited).



## SETTING UP AND MANAGING LISTS IN MIIC

- You may receive a message asking if you want to keep the workbook in the .csv format; click “Yes.” The CSV file is now ready for uploading into MIIC.



- On the “Upload List” page, enter a name for the new list, if desired. Click “Browse” to find the saved .csv file on your computer, and then click “Upload.”

Upload List

Upload CSV Template ([click here for file](#))  
Upload Client Query Template ([click here for file](#))

**New List**  **Upload**

OR  
Update List

List File Name  **Browse...**

- After uploading, the file will begin processing. Click on the “Check Status” button.

Upload List Result

The following Client List file was uploaded:

- C:\Users\ \Downloads\uploadlist.csv

**Check Status**

Job Name which is set as default string "null" has been presented for processing.

- You can click on the “Refresh” button to check if the status is complete. However, the upload processing time may vary depending on the size of the list.

Note: You may work in other areas of MIIC while the list is processing.

Job Date: Past 24 Hours  
Job Transport: ALL  
Job Format: ALL  
Job Type: ALL  
Job Status: ALL

**Jobs**

Job Name	ID	Transport	Format	Type	Org Name	User Name	Trans	Exchange Date	Process Start	Process End	Status
<a href="#">Job 07/01/2020 15:11:26</a>	99928951	MANUAL	UPLOAD LIST/ROSTER	UPDATE	MIIC		Prod	07/01/20 15:11	07/01/20 15:11	07/01/20 15:11	<b>COMPLETE</b>

**Refresh**

- Once the status is complete, you can click on the job name link to get access to “Members Not Found” where you can see if any members of your list were not found in MIIC.

MIIC  
Minnesota Immunization Information Connection

Production Region 7.22

Routine Functions  
manage client  
manage immunizations

organization MIIC • user MIIC User • role Typical User

Download Files for:

- [Client List File](#) ( 155KB )
- [Members Added](#) ( 1348KB )
- [Members Not Found](#)** ( 4KB )

**Manage List**

**Refresh**  
**Cancel**

- If a submitted individual is not found it is likely because a direct match could not be made based on the demographic information provided.
  - Sample text from “Members Not Found”: “Submitted member LASTNAME, FIRSTNAME, 12/27/1985, was not found in MIIC or the demographics submitted were not complete enough to make a match. You can search MIIC manually and associate the right member to the list.”

10. If there are members that weren’t found, you can add individuals to the list. Please refer to the [Managing Lists](#) section in this user guide for more information.

## Create a copy of an existing list

1. The “Save As” function allows users to easily create a copy of another list that was previously created in MIIC. This function could be helpful in tracking immunizations for a group of people over time.
  - For example, employers tracking influenza vaccination rates in their employees could copy a list they created last flu season and adjust it for the current flu season. Users can then add and delete employees from that list as needed.
2. From the “Manage List” screen, find the name of the list that you would like to copy or save as a new list. Click the appropriate “Save As” button.

The screenshot shows the MIIC 'Manage List' interface. On the left is a navigation menu with options like 'Routine Functions', 'Client Follow-Up', and 'Assessment Reports'. The main content area has a 'Manage List' header and 'List Options' with radio buttons for 'Create a New List Manually' and 'Create or Update by Uploading a File'. Below this is a message: 'The list has been deleted successfully.' Under the 'Existing Lists' section, there is a table with columns: 'View Delete List Name', 'Generated By', 'Count', and 'Last Updated Date'. The table contains one entry: 'Test 2' (with a delete icon), 'MIIC User', '(3)', and '07/21/2020'. A 'Save As' button is circled in red at the end of the row.

3. 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.

This screenshot shows the same 'Manage List' interface, but with a dialog box open. The dialog box has the title 'Create a copy of the existing list with the new name given below.' It contains a text input field labeled 'New List Name' (circled in red) and a 'Save' button. There is also a 'Cancel' button at the bottom right of the dialog. The 'Existing Lists' table from the previous screenshot is still visible at the bottom.

## Managing lists

There are three actions for managing a list in MIIC:

- Adding individuals to a list manually.

- Deleting individuals from a list.
- Deleting entire lists.

## Adding individuals to a list manually

1. Choose “add client to list” from the “Lists” menu. This brings up the “Client Search Criteria” screen.

2. Search for a client in the Client Search Criteria. Please refer to [Client Search and Printing Immunization Records: MIIC User Guidance and Training Resources \(www.health.state.mn.us/people/immunize/miic/train/clientsearch.html\)](http://www.health.state.mn.us/people/immunize/miic/train/clientsearch.html) for more information on searching for clients in MIIC.
3. Once an individual is selected, MIIC will display their immunization history, what vaccines are recommended, and any contraindications to vaccination. Verify that the individual selected is whom you were searching for. Add the individual to a list by choosing a list in the drop-down menu labeled “Please Pick a Report List.” Once the list is selected, click the “Add” button.

Vaccine Group	Date Administered	Series	Vaccine [Trade Name]	Dose
DTP/aP	02/01/1994		DTaP,5 pertussis antigens [DAPTACEL ®]	
	04/01/1994	1 of 5	DTaP,5 pertussis antigens [DAPTACEL ®]	
	06/01/1994	2 of 5	DTAP/Polio/Hep B [Pediarix ®]	

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.

4. You will receive a message that says, “Client has been added to the selected list.” To add another individual, go back to Step 1 and continue until all the individuals of interest are added.

## Removing individuals from a list

1. To delete specific individuals from a list, select the view icon for the specific list (it looks like two people). This will take you to a screen with a list of all of the members.

## SETTING UP AND MANAGING LISTS IN MIIC

**MIIC**  
Minnesota Immunization Information Connection

Production Region 7.22

**Routine Functions**  
manage client  
manage immunizations  
enter new client  
request new client form

**Client Follow-Up**  
create follow-up  
manage follow-up

**Assessment Reports**  
create assessment

organization **MIIC** • user **MIIC User** • role **Typical User**

**Manage List**

**List Options**

☐ Create a New List Manually (one client at a time)

☐ Create or Update by Uploading a File

**Existing Lists**

View	Delete	List Name	Generated By	Count	Last Updated Date	
		Test 2	MIIC User	(3)	07/21/2020	<a href="#">Save As</a>

- If you have a large list and would like to easily find individuals, you can sort the list by clicking on the headings (last name, first name, birth date, etc.).

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**Client Follow-Up**  
create follow-up  
manage follow-up

**Assessment Reports**  
create assessment  
manage assessment

**Lists**  
add client to list  
manage list  
Data Submission

organization **MIIC** • user **MIIC User** • role **Typical User**

List Name: Test 2  
Client Count: 3  
Generated By: MIIC User  
Last Updated Date: 07/21/2020

[Back to Manage Lists](#)  
[View/Create Output](#)

<input type="checkbox"/>	Last Name	First Name	Middle Name	Birth Date
<input type="checkbox"/>	DOG	GOOFY		08/16/1982
<input type="checkbox"/>	DUCK	DONALD	N	01/01/1944
<input type="checkbox"/>	MOUSE	MICKEY	K	12/30/1993

[Remove From List](#) Records: 1-3 of 3 << Previous Next >>

- Put a check in the box in front of the individual's(s') name(s) to be deleted. Click the "Remove From List" button at the bottom of the page to remove the selected individual(s).

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**Assessment Reports**  
create assessment  
manage assessment

**Lists**  
add client to list  
manage list  
Data Submission

organization **MIIC** • user **MIIC User** • role **Typical User**

List Name: Test 2  
Client Count: 3  
Generated By: MIIC User  
Last Updated Date: 07/21/2020

[Back to Manage Lists](#)  
[View/Create Output](#)

<input type="checkbox"/>	Last Name	First Name	Middle Name	Birth Date
<input type="checkbox"/>	DOG	GOOFY		08/16/1982
<input checked="" type="checkbox"/>	DUCK	DONALD	N	01/01/1944
<input type="checkbox"/>	MOUSE	MICKEY	K	12/30/1993

[Remove From List](#) Records: 1-3 of 3 << Previous Next >>

## Deleting lists

- To delete an entire list, click the delete icon on the line of the list you want deleted. This icon is the red "X."



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Minnesota Immunization  
Information Connection

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create assessment

home | manage my account | logout | help desk

organization MIIC • user MIIC User • role Typical User

### Manage List

**List Options**

☐ Create a New List Manually (one client at a time)

☐ Create or Update by Uploading a File

**Existing Lists**

View	Delete	List Name	Generated By	Count	Last Updated Date	
		Test 2	MIIC User	(3)	07/21/2020	Save As

## MIIC help

For assistance with using lists in MIIC, send an email to the MIIC Help Desk using the “Help Desk” button on MIIC for any additional questions or use the light bulb icon to access additional user guidance resources.

**MIIC**  
Minnesota Immunization  
Information Connection

Production Region 7.22  
.....

**Routine Functions**  
manage client  
manage immunizations

home | manage my account | logout | help desk

organization MIIC • user MIIC User • role Typical User

**announcements:**

07/08/2020	NEW	~	<a href="#">MIIC release 7.22 is live</a>
03/23/2020	NEW	~	<a href="#">COVID-19 help desk phone suspension</a>
03/11/2020	NEW	~	<a href="#">MIIC release 7.21 is live</a>

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651-201-5207  
[health.miichelp@state.mn.us](mailto:health.miichelp@state.mn.us)  
[www.health.state.mn.us/people/immunize/miic](http://www.health.state.mn.us/people/immunize/miic)

12/21/2023

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