DEPARTMENT OF HEALTH

MIIC Webinar 4 Transcript: MIIC Tools to Increase Immunization Coverage

MAY 21, 2024

Good morning. Thank you for joining us for the last of our bi-annual Minnesota immunization information connection four-part Webinar series. My name is Heather Rieck and I'm a health program representative here at MIIC. I'll be your facilitator for this webinar. Next slide please.

Moving on to some housekeeping details, all attendees will be muted, but you will have the opportunity to ask questions throughout the presentation, which we will discuss in the next slide. This webinar will be recording and the recording and this transcript will be posted on the [MIIC User Guidance and Training Resources (www.health.state.mn.us/people/immunize/miic/train/index.html)](www.health.state.mn.us/people/immunize/miic/train/index.html) MDH website in the days following the session, excuse me in the days following the session. If you have questions that do not get answered during the session, please reach out to us at the MIIC help desk at health.miichelp@state.mn.us. To better assist you, please include your org code. If you come across any technical issues, the easiest way to fix them is simply to log out of the session and then log back in. Next slide please.

To post questions and comments, please select the Q and A channel in the upper right banner of your screen. Next slide please.

At the end of the session, a link will be posted with the CEU survey that can be filled out to receive your CEU credits if desired. You must complete the survey to receive the CEU credits. Please contact your organization to determine if this activity meets the requirement for acceptable continuing education. Next slide.

The recording transcript and CEU survey link for web for this webinar are posted on our user guide and training web page in a few days [MIIC User Guidance and Training Resources (www.health.state.mn.us/people/immunize/miic/train/index.html)](www.health.state.mn.us/people/immunize/miic/train/index.html). Next slide please.

For those who were unable to attend our previous webinar sessions in this series, our introduction to MIIC and reviewing client immunization histories recordings and transcripts are available on the Mickey's or guidance and training website. Please note that the recording for webinar 3 covering getting data in and out of MIIC has not been posted yet due to issues with Webex. Comms is working on a fix, and it should be posted soon. Please check back later this week. Next slide.

In today's session, we will be covering MIIC's tools to increase immunization coverage. Topics will include defining key terms, demonstrations of lists assessments and client follow up and will end with a question-and-answer session. Next slide please.

Now let's move on to today's presentation, please welcome my colleagues, Jenevera and Taylor, as they discussed defining functionality. Take it away, team.

Next slide please. My name is Jenevera Wolf, in a little bit I'll be going over demoing how to create a list. I just wanted to let you know that you can create a list in MIIC using the upload list file template. It does need to be a CSV document, you can add or edit list once you've created them, and list are usually created to establish a select group of individuals and you can do that by uploading just one file rather than doing it 1 by 1. And list are used to track immunizations for specific populations. Go ahead and go to that next slide. Were you not able to hear me, OK?

Sorry, my audio went out for a second. My goodness alright. So, I'm Taylor. I'm gonna be walking through or we're gonna define assessment reports. Then after this, we're gonna define client follow up. So right now, for assessment reports, they can help identify the percentage of clients who are up to date on selected vaccines recommended by the advisory committee community on immunization practices. With assessments, you can do either a list based or a clinic-based assessment report and then in there you have a couple others you can choose from. You can do childhood adolescent adult and single vaccine reports and the next slide.

Some of the benefits of assessment reports, so assessment reports have a lot of benefits. You can check your organizations data quality within MIIC using the assessment reports. So, you can assess some baseline immunization rates, you can identify any areas for improvement within your organization and it can help implement practice changes and or outreach activities to improve those rates. And it is regular. You can regularly monitor rates to see whether practice changes or outreach activities are making an impact. And then next slide.

So, this is about the client follow up function we have in MIIC. So, client follow up can be used to identify clients due or overdue for immunizations and conduct outreach to improve immunization rates. So, like in the last slide we talked about outreach activities, client follow up will help you with doing those outreach activities. With client follow up you can do a list-based, clinic based, or County base and this is dependent on your organization for that county-based part. as well as clinic base. And they can also be used to clean up your client population. So, if you have a group of people that no longer come to your organization for anything, then you can break that relationship with them or that association to clean up that population so they're not pulling up in all of your reports if they're no longer coming to you for services and the next slide.

So, this side is talking about mass inactivation. So, in the last slide we talked about cleaning up your client population. This is how you can do that using client follow up in MIIC. So, you can create a list-based cohort in client follow up and then you can use that to inactivate a group of clients all at once. Makes a lot easier if you have a lot of clients that came in at one point and then are no longer coming to your organization for services. And then for some more detailed steps. You can utilize our user guidance that we have for using mass inactivation and then you can still individually inactivate a client either when managing it in the manager client in MIIC or on the manage managing client follow up screen [Using Client Follow-Up MIIC User Guidance and Training Resources (www.health.state.mn.us/people/immunize/miic/train/cfu.html)](www.health.state.mn.us/people/immunize/miic/train/cfu.html). And then next slide.

Thank you everybody. That was wonderful. We don't currently have any questions, so let's move on. Please welcome our colleague, Lizz, and welcome back Taylor and Jenevera as they begin the live demonstrations.

Thanks, Heather. So, now we're going to walk through a use case to help conceptualize these three functionalities in MIIC. So, we're going to pretend that my name is actually Princess Peach and I work at a clinic called the MIIC Testing Org and I was reviewing some public health data on our Minnesota public health data access portal. And the childhood immunization measures which utilize MIIC data to look at coverage rates among Minnesota children ages 24 to 35 months and it breaks it down by each of the seven vaccines listed here. And in particular, I was kind of noticing what the trends are looking like for MMR rates across the state here. And so, after reviewing these statewide rates, I wondered what my clinics rates are. I am especially interested in those MMR rates, and because my clinic participates in MIIC and has granted me access to the MIIC user interface, I can generate an assessment report to view my clinics current immunization rates. So, I'm going to go ahead and log into MIIC. This is our test region, our test environment of MIIC. So, all of the data in here is for test clients and not for actual living people.

But once I'm logged in to my MIIC you can see here again that I'm logged in under Princess Peach under as a typical user role and I'm going to go on down to the assessment reports section of this left-hand navigation menu and from here I'm going to go ahead and click create assessment. I'm then going to select the standard childhood report, which looks at children ages 20 to 35 months of age who are associated with my clinic, and it tells me about the percentage with an up-to-date immunization status as of the date of the trial's second birthday. Because this is a standard report, I don't need to figure out that birth date range. It automatically calculates that for me. I can go ahead and name the assessment report if I want, like saying 24- to 35-month-olds. And then I'm going to go ahead and click generate.

This brings me to the manage assessment screen and from here I'm going to see a role for each assessment report that I've generated in the past two weeks. I previously deleted some of those old ones. So, we just have the one that we're running now, but at a quick glance I can view the name of the report, the date the report was generated, the status of the report, and the count of the clients included in this cohort that I selected. While this report is in process, the count is going to be null. There's not gonna be anything in the parentheses here. But I can select the refresh button after a bit and I'm gonna get an updated status and once this report is in ready status now is going to show me the count of clients who meet this cohort criteria. So, this tells me I have five clients between the ages of 24 and 35 months of age who are associated with my clinic.

So, now that the report is ready, I can go ahead and select the view icon in this left-hand column of this screen. From here I can select the output options that I want to generate. We're gonna, today we're gonna generate the summary report and the patients not up to date list. Once I check the boxes, I can go ahead and click generate output. And the reports generate pretty quickly on the screen but from here I can select the paper view icon to view the output. So, we're gonna start with the summary report. So, when I open that, and I'll zoom in a bit here. So, this summary report indicates up-to-date rates by 24 months of age for the clients who were assessed. Now remember, I ran the standard childhood report. So, it's assessing clients 24 to 35 months of age. The bar chart here displays my clinics current rates for various immunizations, plus the routine childhood series. I can compare the bar to the black dot which indicates the Minnesota average as of July 2023. That average gets updated every summer.

The table below as I scroll, will list the client count and the percentage compared to the Minnesota average and it also defines what is considered up to date for 24-month-olds for each vaccine group. So, for example for MMR, this will tell me the number of clients who were up to date by 24 months, so three of the cohort that this report assessed, which puts me at 60% who are up to date by 24 months of age, and I can compare that to the Minnesota average of 79%. And again, this will define what it's looking for when it's considering up to date by 24 months. So, to be considered up to date, a child should have at least one dose of the MMR, measles, mumps, and rubella vaccine by their second birthday.

So, if I now were to go back and select the patients not up to date list, I could view the list of clients assessed along with an indication of which clients were not up to date. Scroll back up here. So, this will tell me so, these four clients were not up to date for the entire childhood series by their second birthday and it in this section of the table I can see which vaccine was not completed or was not up to date by 24 months. And in this far right-hand column, this will tell me which clients are still overdue. So, this tells me that all four of these clients did not complete their childhood series by their second birthday and all four are still overdue for at least one vaccine in the childhood series. I can take this list and share it with my clinics care coordinator to send recall notifications to their families utilizing our clinics EHR. We want to bring those kids back to the clinic to get them caught up, but it would be considered late vaccinations since it is now past the child's second birthday.

Again, we're still going to do that, but we also want to take steps to improve us up to date by 24-month rate moving forward. And just start I need to look at our coverage rates for kids who are less than 24 months of age. I have a colleague in the clinic here who can export a client list from our EHR based on certain criteria that we set. So, in this case, I want a list of clients who are 18 to 23 months old. Excuse me, but only those who have been seen at a clinic in the last six months. So, this EHR based list can help with creating a list in MIIC to run a custom assessment report, so I'm gonna turn it back over to Jenevera to walk through the list function in the MIIC.

Hi there. Sorry I'm donna apologize for my voice. I don't normally sound like a frog. So, I'm gonna actually start from the beginning here. Lizz kind of went through what you guys would do to run those reports but I'm gonna just start with logging in to MIIC. Again, this is our test environment. Just to recap, we do need an organization code, a username, and a password to log into the application. If you don't have that information or you don't know for sure what your login is just e-mailing the help desk and with your organization coder, some part of your organization name and we can look for you. The help desk email is on this cover page right here health.miichelp@state.mn.us. So, I'm going to put that information in and log in. Before I go too much further, I do want everyone to know that the list feature is available to all user roles within the application. I am logged into MIIC under the test org here and I my user role is typical user. We're using this because it is the most common role in the application, but read only users and above can also use this list feature. So that said again, we're going to use typical user, so if you're read only your screen it looks slightly different. If you're an admins, it'll look slightly different as well, but the list features does stay the same for all of those roles.

So, there's a couple of ways to create a list. Over here on the left side navigation bar, there's this list header right here, and you can do add client to list. This option is if you already have an existing list that you've used and you wanna add clients to it again. In this case clients means patients or people that you're providing care for or there's manage list. So, I'm gonna click manage list and on this screen depending on your organization, it'll be entirely blank, or it'll have a couple of lists or few lists like you've seen here. You will see as this user depending on who you're logged in as, you'll see any lists that have been created under this organization code here. So, even if you are not Barbie Sparkles, if you've logged in as Rachel, you'll see all of the lists that anyone has created. Again, there's two ways to create a list. You can create a list, one client at a time. This top button right here. So, if I click on this, it'll tell me to pick a name and you can name it whatever makes sense to you and click save. And now you'll see on the screen that it looked, it looks like Barbie Sparkles created list test list for webinar and there are zero clients on this list.

So, if I click view, there's not going to show anything because there's zero clients, but say I've started this and I wanna go add a client to it. So now I'm going to use that add client to list option that I showed you before, so I'll click add client to list and I'm gonna put. These are gonna all be fake clients just so everyone knows. I'm gonna look up Kylo Ren here. I'm gonna find Kylo's record and then this dropdown. This dropdown will only appear when you've clicked that add client to list option. I'll click this drop down and I believe this is the one I just created. You'll kick click the drop down and I'll give you all of the lists that are available that this client is not currently on. So, I'm gonna click on list for test webinar or whatever I said and clicked add and it'll tell me that this client has been added to the selected list. Now to check the list to make sure that Kylo has been put on here, I can go back to manage list and now you'll see that the list that I just created has one client on it. So, if you wanna do it manually, that is how you do it. Again, to add another client you would just go add client to list. And if I look up Papa Smurf, I'll pick the drop down. Click add. It'll say that the client has been added and I go back to manage list and then now there's two clients on there. And now if I click view you can see that it's got Poppa Smurf and Kylo Ren on here.

That is kind of pokey, so if you're comfortable with Excel, the easiest way to load a lot a lot of clients is using the list template. So again, you're gonna go back to manage list and instead of this top radio button, you're gonna click this bottom one. And I'll give you two templates here. We're going to use this top one the upload CSV template. You're gonna click there for the file. Depending on your computer, it'll open somewhere. Mine opens up in the top here, and then this is the template. I'll just show you what the template looks like real quick. It's not pretty. It's not amazing. It's you know, it's kind of boring. But this is what the template is. When you do have this template, you do wanna make sure and I can't stress this enough that you do save it as a CSV file. Sometimes Excel likes to change it to an XLS or Excel S anyway it likes to change the format. So, make sure you save it as a CSV file, do not change any the organization of the columns at all so the columns that are in here ABCD through H, they need to stay in the order they are, and they need to keep that header row. So, don't remove the header row and don't change the organization of the columns. So, I'm going to close this just so you don't have to see me try to type stuff in.

I do have a test list already created. So, this is my test list. So, I'm just expanding the column so everyone can see it. So, as you can see that header row is still in there. It is last name, first name, and birth date. Those are the three actual required fields for this file to work. If you are missing birth dates, if you're missing a last name, if you're missing a first name, the whole file will not load. So, you do need last name, first name, and birth date. If you have the other information that's asked for on here, you can certainly put it in. This unique record ID number I kind of want to call attention to, this column G, this number is specific to your organization, so if you have it, you can put in there. Again, if it's you know if you have school ID numbers for kids you that number can go in there or I think it's MRN numbers for clinics or MNR anyway, but it is specific to your organization.

The format of the birth date does need to be month, month, day, day year, year, year with the slashes in there. If it's not formatted correctly, the file won't load. The other thing is if you have any special characters, so if you put, if you put like Hans Gruber has nickname and you put nickname in parentheses here, the file will not load. If you put like if there's a Rebecca and you call her Becky sometimes people, put in Rebecca slash Becky, the file will not load. If there are leading spaces in any of these fields. So, if you put a space before Drogo last name here, even though you can't see that the file will error out. So, there's just some things to look for. I didn't get rid of that, so this doesn't break.

So, once you've created this, I'm sorry, once you've created this, go ahead, and hit save. Make sure you've saved it to somewhere on your file or on your computer rather. I'm going to hit save as just so you can see you do want to make sure it says saves as a CSV or comma delimited file and I'll hit save. OK, I'll close the file. And then we'll just pretend we've just logged back into MIIC. We'll go back to manage list and then I want to go back to that button cause initially before we were just grabbing the template.

So now that we have finished our list, we're gonna go back to where we were. And now in this top box, it's a new list. So, we're going to put. Obviously, you can come up with more clever names, so we're going to put new list for webinar and we're going to choose the file. We'll hit open and then upload. This will tell you that the file is uploaded. Now depending on how large your list is, it could take some time. This list is pretty small, so it should be done. If you have a file with thousands of clients, it's gonna take a while to load, but you can certainly load a file that large.

So, we'll hit click check status and this is the trick status stream. Over on the right side you do want it to say complete. If it says error, it means something is wrong with your file. If it says exception, it means that MIIC is being a teenager and there's a problem, so you can always contact the help desk. But error means there's something wrong with the file complete means it has finished. Now to look at the list, you can click on this job name right here. So, you click on that, and this will just give you a summary of what happened when the process the file was processed. So, if you look at the bottom here, it'll tell you that there were twelve clients on the file. It processed 12 of them. It added nine to the list and it did not add three to the list. And I just want to show you what happens when there's sometimes reasons clients are not added to the list. So, on the top of the screen, this client list link is actually just a picture of what or it's what how MIIC reads the file. So, that's basically your file. This one will tell you what clients were added to your file, and it will give you the MIIC ID numbers over here on the right. And then this bottom one will tell you if there are members that are not found. So, just I want interview to note that Tootles McSparkles here was not found in MIIC or it didn't have enough information and I put that on there just because MIIC is an opt in IIS so not all clients will exist if they don't exist in MIIC, and you want to create a list and the client and Toodles is not in MIIC, it's not going to add them to the list. The other options are Sugar Toast here is locked to an organization or did not give consent to release and Donald Ducky did the same thing. Now I'll go real quick and just show you what that looks like.

So, it'll look up that client. I'm gonna look up, I think it was Toast. So, I'm gonna look up Sugar Toast here and I just wanted you to see that this means that this client has opted out of MIIC. So, MIIC does have the information, but the client doesn't want anyone to see it. You can certainly call us and ask that about the ask us about this. Ask us about this. But if a client has opted out, it is their decision to not have their information be in the application. So, it's ultimately up to the client to make that call. Let me look up Donald Ducky because I forgot. I think this one is just deceased maybe. He's 22. So, this one I just wanted to see because clients, they can opt out of MIIC, or they can actually lock their record to a different organization. In this case Donald Ducky has locked his record to MIIC Chickens. So, we're not gonna be able to have access to it. And that last client Toodles McSparkles just doesn't exist in MIIC.

So that said, let's go back to manage list and now you'll see that the file that I just loaded has nine clients on it and it's the new list. There's a couple things you can do here if you wanna duplicate this list, you can click save as and then save a new list and it's just a, it does say, it asks if you want to verify. It'll just show you that it has made a new copy of that list. You can delete any of the list here you can delete any of the list from any other users as well. And then you can also continue to add clients to this list. So, if I wanna go back to add client to list, I'm just gonna show you what it looks like when there is a client that's already on the list. So, we're going to look Hanz Gruber here. So, say I didn't think that Hanz was on that list. You got a list with a thousand clients, and you wanted to add Hanz to that, you'll notice that the list that we just created is not on this drop down. And that means that Hanz currently exists on that list. So, I'll go back to manage list and if you view it, you'll see that these are all the clients on this list. From here you can click on the last name of the client, and it'll direct you to their record. It looks like it opens it in you or if you wanna click on to Tyrion Lannister you can do that. And then I think that's all I needed to go through, and I just wanted to reiterate that to making sure the biggest errors that we have are special characters, extra rows, I did want to show that. I had a user contact me. They were trying to do several lists at one time, so they had an extra row in their file, so they had like 30 clients on the top and then an extra row and then 30 clients on the bottom and the error the file errored out just because of that extra row. So, make sure you take out any extra rows as well. So, I think that's all I had on how to create a list and I don't recall if we're gonna wait for questions or not.

We do have two questions real quick, OK. The first is can we create a list of our employees.

No. You cannot. You shouldn't be using unless you're providing services for those employees, unless you're actually immunizing them, you shouldn't be looking up your employees and MIIC.

Thank you, Jenevera. And one more, why is a child that I put on my list not showing up?

So, there are those reasons I showed. It would either be that they don't exist in MIIC and that they're so say they have a common name like Donald Ducky, I knew his birthdate, but there's a lot of Donald Duckies in our test environment. Sometimes they'll be like 30 clients with the same name. So, you have to narrow it down. When that happens, you just need to find the client. You have to narrow it down by searching it and then the other option would be if they're locked to a specific organization.

Thank you, Jenevera. That concludes the questions for the list portion.

Alright, so I'm gonna take it back here then. There we go. So, getting back to our sort of use case story here now. So now that we've learned about list and MIIC and our colleague went ahead and created that list in MIIC for us, we can once again run an assessment report in MIIC but this time checking the coverage rates just among those clients who we have added to the list. So, we're gonna come on back to create assessment. Again, if I had just logged in, going over here to the left-hand navigation bar to select create assessment. I'm still interested in those childhood rates, so I'm gonna stick to this top section here, but this time I'm gonna select use existing list underneath the child vaccinations by 24 months heading.

From here I can go to the list name field, and I can view all of the list that somebody within my organization has created. I'm going to go ahead and select our demo list here from the drop down. Once again, I can name this assessment report if I want and we had said this, we were looking at our 18- to 24-month-olds. And then I can go ahead and click generate. Once that report is ready and we'll refresh it a couple times until it's, there we go. Now it's in ready state. So once this report is ready, I'm gonna select that view icon again and once again I'll generate that summary report and I can generate the patients not up to date list. These reports can then be used to remind clients. sorry, once I can open this up, I can take a look at what our rates are looking like. But this time instead of basing it on a cohort of clients by birthday, it's just looking at all of the clients on this list. I can, so I can use the summary report to take a look at what are my current rates, I can use this patient not up to date list to take a look at who was not or who's not up to date by 24 months which means who's not up to date right now. Right? Because my list is looking at everyone less than 24 months and I can reach out to those who are still overdue for something.

Alright, so these reports can be used to remind clients to return to the clinic for that first MMR dose and any other routine childhood immunizations that are due in order for them to be considered up to date before they reach their second birthday. Now, ensuring clients are up to date for that first dose of MMR is important. But I also know how important it is for the child to complete the series by receiving the second dose between ages four and six years of age. So, to look at coverage rates for complete series of MMR, I can use the adolescent assessment report in MIIC, even if my target population is too young to be considered adolescents.

So, if I go back to manage and then back to create assessment. From here, we can start to look at the reports under the adolescent vaccination heading. Now the standard adolescent report only looks at clients who are between the ages of 13 and 17 years of age, associated with my clinic. But because I'm interested in four- to six-year-olds, I'm going to select custom population. From here, I'm going to enter a beginning age of four and an ending age of 6. So, this is telling MIIC I wanna look at clients who are have hit their fourth birthday and is not have quite yet reached their seventh birthday. It's gonna automatically calculate that birthday range for me, so I don't have to do any of the math on that one. I can also change the age as of date. So, if I were trying to compare this to, you know rates over time, maybe I say I wanna, I wanna look at what is our coverage rates for four- to six-year-olds and based on January one of this year. I can also, from here I can then go ahead and click generate. Sorry. I forgot to hit assessment date. I could also change the assessment date. So, if I wanna if I'm saying look at the age as of 1/1/2024, maybe I want to know what you just looking at immunizations that had been administered prior to January first of this year, otherwise I can use it for today's date. If I were to change this to January one, then that even if a child had received an immunization in the first part of 2024 because that occurred after January one, which is my assessment date, MIIC will sort of dis will not consider it in this report. So, I'm actually going to change this back to today's date. So, I wanted to know of those who were between the ages of four and six years of age as of January one of this year's, what is their current immunization status? And from there, I'm then gonna go ahead and select generate.

Take me back to that manage assessment report and we'll give it a little bit of time to refresh here. So, this is telling me that there were fourteen clients associated with my clinic between the ages of four and six as of January one. So, I'm gonna go ahead and click view. Now, because the clients I'm interested in today are too young for the full adolescent platform, I only have the one output option which is the summary report. So, I'm going to go ahead and generate that, and we can go ahead and view that summary report. Now, of course, the bar chart on the left here it's not really useful because again, the clients were looking at are too young for any of those adolescent immunizations, but the bar chart on the left here, provides coverage rates for select childhood vaccines and MMR is one of those select childhood vaccines we're looking at.

So, similar to that childhood assessment report, I can compare the bar to the black dot which is the Minnesota average here. I can also scroll on down to the table here and see actual numbers. So, two clients in my list have are considered up to date for MMR. That's about 14% of my list or of my clinic population for four- to six-year-olds, and I can compare that to the Minnesota average of 82% for this age group. And again, it defines what it is that we're looking for to be considered up to date or we're assessing these clients to see if they have had at least two doses of MMR vaccine. So, now that I can see we've got a bit of work to do to increase our two plus MMR rates, I'm going to ask our care coordination team to start contacting families to recall kids back into the clinic and to do that, we're going to utilize the client follow up function in MIIC. And so, I'm going to turn it back over to my colleague Taylor who is gonna walk through that functionality for you all.

Awesome, I'm going to now share my screen. All right, so you should be able to see that I am in MIIC. We're on the home page again and so, what we're gonna do since Lizz has showed us that we know that our MMR rates at the clinic are low, we'll now look at using the client follow up function to identify those who on our list of clients is missing MMR doses so that we can start contacting the families to recall them back into the clinic. So, to do that, once again, we log in under our clinic organization, we are typically user, and most users should have access to the client follow up function. So that'll be on the left-hand side here under the minute menu group client follow up. So, what we're gonna do is we're gonna click the create follow up button. And here we can see the couple options we've got. We have a link to our user guidance here. So, you can always click on that if you forget what to do when you're in client follow up, you have two options. So, you can create manually. So, this will give you where you can kind of do whatever you want essentially to click, put the age group that you're wanting, your follow up type, vaccine type and so on.

But for today, what we're gonna do is we are going to use the create from existing list option. So, since one of our colleagues had uploaded a list for us of all of the patients that we've been in communication with, that we've had, we're going to utilize that list. So, to do that, we're gonna come up to this drop down and we're going to find the list that was uploaded for us. We gonna click on that and then the next thing we're gonna do is we're gonna go to follow up types. So, we're gonna decide what type of follow up we're wanting to do, for overdo this pull everybody from our list who’s overdue for the vaccines that we're gonna select later, recommended, this will pull all the clients that are recommended for the vaccines we've selected, overdue or recommended will pull all the clients on our list that are overdue and or recommended for the vaccines and then this all clients regardless of vaccination status option, this is gonna pull all of our clients on her list, regardless of whatever vaccinations status they've got. So, everybody will be pulled up into our client follow up report. For us today, for our clinic, we're gonna stick with overdue, and then we're gonna scroll down. So, we have a couple options here too, so you can either do vaccines the vaccine grouping or individual vaccine options. So, with this, you can choose these groupings. So, if you select child, it'll select all the childhood vaccination options from this individual vaccine pick list down here or you can do adolescent, it'll do all the adolescent ones, or you can just do one or multiple you can select what you want. It's all up to your clinic and what outreach you are going to be doing.

For us today, we're going to be doing this select vaccine group and number of doses already received option. So, for here we're going to click this vaccine group drop down and we are going to select MMR and then a couple other drop downs pop up for us. So, in this trade, name one, we're not going to utilize this because our follow up, it doesn't matter for us what trade name the client might have received but your organization if it matters, you can always select on trade name as well. You do not have to it as an optional field. And then we're gonna decide what doses received. We're gonna wanna go for. So, we are gonna wanna do the 0 doses. We're gonna look at those on our list that have not had any MMR doses provided to them. And we're going to name our follow ups. I'm gonna name it. That's it. No MMR doses.

This way we know what our client follow up was pulled for and then we're gonna hit the create follow up button.

So, now it's gonna pull us to this manage client follow up screen. As you can see, I've pulled one already. This is the one that we're currently doing. So, it's 45%. So, we can hit refresh to see if it's ready. And it is ready for us to go. And it just depending on how big your list is or how big of the client follow up that you're pulling is, it might take a little bit longer than I just did for us to pull up. So, you can hit refresh, you can wait for it and when it's ready, it'll say ready in the status section. So, as we can see in our client follow up, we had six people from our list pull into our follow up. And we got the name here. We can delete the ones if we don't want them or not. But we are going to hit the view button. So, this will now show us this client follow up screen and this is gonna have the list and a couple options for us. So, here on this initial list for easy identification, see if you will highlight some clients in either red, yellow, or orange. As we can see here, we have one client that's highlighted in red, so what these highlights mean, they mean a couple of different things. So, that if they are highlighted in red, it means that the client has stated that they do not want to be contacted for reminder recall. So, they will fall off of any other outputs that we pull, they will not, we don't want to contact them for reminder recall because the client has stated please do not contact me.

For those that might be highlighted in yellow, it means that they have an insufficient address information on their record within MIIC. So, there's a chance that you might not be able to follow up with them just because the address information we have might be incomplete or insufficient. And those highlighted orange, those have been marked as having an undeliverable address. So, that means we're not able to contact them cause the address that we have within MIIC is undeliverable. And then on this initial page, we can filter or sort our list that we have here, so we can do that by clicking this filter drop down and we can filter by whatever we want. So, I'm gonna just click this one clients with no immunizations, and then you hit the apply filter. So, what that does is it's gonna pull those that have no immunizations on their records and highlight them green. It's going to put them towards the top and then everybody else will be at the bottom. And we're going to remove that filter and we can do too is we can sort. So, you can sort by a couple options, last name ascending, last name descending, just depends on how you want what will make it easier for you to look at the list. You can also click this little plus sign button here and that'll add a second sort option. So, you can sort by two different options if you want or just one. It's all up to you, whatever makes most sense as you're going through and creating your follow up.

So, now that we have our list of clients that are missing MMR doses, let's look at some of the reports that we can pull to run our own reminder recall projects. So, to do that we're gonna go to this view slash create output button and on here as you can see, we have a couple of report options we can do. And we can pull these one at a time, a couple at a time, it doesn't matter. So, we're gonna do, we’re gonna do these two together because they tend to be OK pulling at the same time. So, you'll click the little check box, click generate output, you'll get this pop up just letting you know that it might take a little bit. Hit OK, hit OK again. And then these popped up in are ready for us to view. So, we're gonna look at the, actually I'm gonna let these ones generate force too as well, so they're going to get started and search generating as we look at the client report option. So, for client report you hit this little arrow and it's gonna show you the paper view button. So, you're gonna hit that. And that's going to pull you into a PDF. So, this client report is a PDF that can be printed and used as a tracking sheet for your organization. So, you can use this. If you would like and it will have all selected clients with a list of all vaccines that are included in your client, follow up and then there will be label options on the side so these labels will show up that appear next to each vaccine. So, this just shows us that Regulous is in need of quite a few vaccinations. This one here is blank, so if it is blank, it just means that this client's not recommended or overdue for that dose. Sometimes I don't think we have it on here, but sometimes you might have one that says NV, NV means that dose that is entered on that client's record is marked as not valid. So, there's, so, it could be some core sort of issue with that vaccination that was entered on their record.

And we're going to go back. We're going to take a look at the mailing labels and once again, we're going to click that view paper icon. So, here this also pulls up as a PDF and this is a PDF that you can print directly to a comma 3 inch by 10-inch label sheet that you can use for mailings. So, and then those that have opted out of reminder recall, so as you can see Regulous is not on here. If they've opted out of reminder recall, they're not going to show up on this output, or if they have an undeliverable address, they will also not appear on this output. So, this is anybody that will show up on the mailing labels output will be those with addresses that you should be able to mail to and that they've not opted out and on here, so this everybody's gonna have this number above them, above their name. So, this is just their MIIC ID. So, everybody will have the MIIC ID on there and then they've got their first and last name as well as their address.

And see if the mail merge option is ready for us and it is. We're going to look at that. We're gonna get the contact list started, so I kind of have to do these ones separate because sometimes they'll just wait and queue and take forever. So, we're going to hit this view icon again for the mail merge option and this will open up on the top here and it's gonna open up in Excel. So, we're gonna open again and this is what it'll look like. So, mail merge this is a X Microsoft Excel file that includes the MIIC ID, last name, first name address, other address fields like PO Box and then it's got city, state, ZIP code area code, phone number and then email address as well. And you can pull your mail merge information from this Excel file for using Microsoft Word document and this file can also be customized once saved to your computer. So, you can add any columns that you need to get the names to show on the envelope or label precisely the way that you're going to need them to be displayed, so you can kind of mess around with this Excel file once it's saved onto your computer and make it work for whatever reminder, recall projects you are doing. And exit out of that and then we are going to see if our contact list is ready for us and it is.

So, we're going to click the little view option for there too. Open this up. This also opens as an Excel file. So, for this contact list, this also is an Excel file, and it is a list of clients contact information, so it includes the same information that was displayed on the client follow up screen like name, date of birth, address information, whether they have undeliverable address and stuff like that, and this spreadsheet makes it easier to just search for and sort a large list of clients. So, if you have over a hundred clients, this might be a better way to look at them and kind of sort through, sort through them as well.

Exit out of that. So those are all of our outputs that we have within the client follow up functions, so after we've pulled all of those reports that we needed, we are then ready to continue the process for conducting our reminder recall projects at our organization. So, we've got all the stuff we needed, and we can follow the rest of the process that our organization has for conducting remainder recall. And that is all I have for the client follow up function today. I will now pass it back to Danielle and Heather.

Right. Thanks team. That was fantastic. So, we're gonna move into our question-and-answer session now. So, we have one question here. So, it says, suppose I created a list and then created a new CSV list if a child is already on the first list, what will happen with the CSV edition?

So, if you, so the CSV that you load into MIIC is your files if you have already loaded it into MIIC and you've added a client to the list, it's not going to change the file you have in your computer. I'm not sure I quite understand the question, but if you've added a client to a list that you've already loaded into MIIC, it'll add it to that to that specific list, but not to your CSV file. You'd have to go do that separately.

Thank you, Jenevera. Right. The next question, what does the warning status in client follow up mean?

So, the warning status means that you requested a large report, so you can just press on the view icon to proceed that warning does not mean that the follow up will not process but it may just take longer to process than other follow-ups. So, you just gotta be a little patient with it. It just might take a little bit longer to pull everything in because it's a large, large follow up you’re pulling.

Thank you, Taylor. Our next question, how can I look at a report like this for specific set of people that are part of my clinic population?

I can start. I'm wondering if this is in reference to those assessment reports, so the graphs and tables related to immunization coverage rates.

Yes, I believe it is.

Awesome. So yes, if you are just looking for a specific set of people, there's a couple of different things that you can do. So, what that custom population, let's say you want to narrow down your client population by age, the custom population is a great option for that. Let's say you want to narrow down your client population or look at a cohort of people but not based on age, but by some other designation. So, for example, if you are trying to run a quality improvement activity that looks at increasing vaccination rates amongst patients who have been diagnosed with asthma. If you can generate that list of patients from your EHR, you can utilize that list to, from your HER, to then create a list and MIIC to look at it that subset of folks within MIIC. MIIC does not collect or retain information related to co-morbidities or other medical diagnosis. So, there isn't a way for MIIC to identify those folks. You would need to identify those folks on your end or through your HER and use that to inform the creation of a list in MIIC that you can then use to generate assessment reports or client follow up.

Thank you, Liz. And we have one more question, when I run this report from my clinic, the number of patients assessed looks way bigger than it should. How can I change this?

I can maybe start and maybe Taylor you can add to it. So, assessment reports, when selecting the standard or the custom population option, it is looking at clients within an age range associated with your clinic in MIIC and associations are made with your clinic in a couple of different ways. If you administer a vaccine and report that to MIIC, if you learn of a historical immunization or an immunization administered by somebody else that's not yet in MIIC, and you report that to MIIC or if you go in and update our client’s demographic information like updating their address or phone number. All three of those are ways that a client becomes associated with your clinic within MIIC and once that association is established, it maintains an effect until you or someone from your clinic goes in and says this client is no longer associated with my clinic. And you can either do that individually or manually through the managed client screen, or if you have a large group of clients, you have identified as no longer being associated with your clinic, you can inactivate them all in one fell swoop utilizing client follow up and the mass inactivation option within client follow up. Taylor anything you want to add to that.

I think you covered it pretty well. Yeah, if you have a large group of people, you can use client follow up when we have those step-by-step user guides on how to do the mass inactivation. If you do have any questions, you can always contact the help desk and work with you more on that.

Alright. Thank you all for your informative answers. This concludes our question-and-answer session. The link to today's evaluation has been posted in the chat and it will allow you to receive your CEU credits in the next few days Spring 2024 MIIC Webinar 4 Evaluation (https://survey.vovici.com/se/56206EE32988706A). Along with the long-awaited webinar three session, we will post the recording transcript and CEU survey link on our trainer training and user guide websites MIIC User Guidance and Training Resources (www.health.state.mn.us/people/immunize/miic/train/index.html). Please check back regularly. For MIIC assistance, please contact our help desk at health.miichelp@state.mn.us. Please be sure to include your organization code and username to better assist you.

Next slide please. Here's a list of our resources which have been posted in the chat throughout the presentation Uses for Lists in MIIC (www.health.state.mn.us/people/immunize/miic/train/lists.html), Client Follow-Up (www.health.state.mn.us/people/immunize/miic/train/followup.html), Using Client Follow-Up (www.health.state.mn.us/people/immunize/miic/train/cfu.html), Using Client Follow-Up for Mass Inactivation (pdf) (www.health.state.mn.us/people/immunize/miic/train/inactivate.pdf). Next slide.

This concludes today's webinar, and we are so thankful for your attendance and participation in all of our webinars. Please keep an eye on your email for the recordings of each presentation, their transcripts and CEU survey links. We thank you for joining us and have a wonderful rest of your day.

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