

CAIR2 Account Update Instructions

Revised: 01/31/24

Important Information:

- Only authorized staff (i.e., supervisors and/or administrators) at the organization should be logging into the CAIR2 Account Update website and submitting requests, **not** individual users. Sites should identify one or two staff members to be responsible for submitting requests.
- Enrolling your site in CAIR2 and submitting an Account Update request does not automatically grant your site access to log into CAIR2. Via an Account Update request, you must request a new CAIR2 user account for yourself and/or staff by following the steps in <u>New CAIR User Account</u>. If you or any of your staff previously had a CAIR2 user account at another site, then follow the steps in <u>CAIR User</u> <u>Transfer/Additional Access</u>.

If you are a Data Exchange (DX) site, please read before requesting any users:

- In most cases, the only user role your organization will need is the 'Quality Assurance (QA)' user role. This
 role allows a staff member to log in to CAIR2 and monitor data exchange transactions using the 'Check
 Status' feature, look up patients' immunization records if needed, and run various site-level reports,
 including Doses Administered and Reminder/Recall. The 'QA' user role requires no formal training, and
 your staff will get immediate login access to CAIR2, upon approval of the account request.
- The only time your organization would need other CAIR2 user roles is if your site plans to use CAIR2 to
 manage vaccine inventory ('Power' role), needs to manually correct patient information/doses
 administered or enter historical doses or TB test results ('Regular' role). See the <u>CAIR2 User Roles</u> chart to
 view the features for each user role.

For additional support, contact the CAIR Help Desk:

Phone: 800-578-7889 Fax: 888-436-8320 Email: <u>CAIRHelpDesk@cdph.ca.gov</u> The **CAIR2 Account Update** website allows you to modify your organization/site and user info in the following order (unless otherwise specified):

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Update CAIR Organization Account- Site Information

The CAIR2 Account Update page allows authorized representatives to: 1. Update site/org account information (e.g., address, contact info)

Welcome to the CAIR2 Account Update Page!

IMPORTANT: Only Org/Site supervisors should submit Account Update requests.

1. If you are an authorized staff (i.e., supervisor and/or administrator), go to the <u>CAIR2 Account Update</u> website. To log in, enter your organization's 'Org Code' and 'Zip Code' and click the **Sign On** button.



- Once you have registered and enrolled your organization on this new CDPH site, you can look up the immunization status of a student or a list of students.
- Contact the CAIR Help Desk at <u>CAIRHelpdesk@cdph.ca.gov</u>, Phone: 800-578-7889 if you have any
 questions.

ACCOUNT UPDATE USER INSTRUCTIONS

	ORG CODE: ENTER YOUR ZIP CODE: Sign On	-
If you have trouble signir by	ng on, contact the CAIR Help Desk / Email: <u>CAIRHelpDesk@cdph.ca.g</u>	at: 1-800-578-7889 or

Note: If you or another authorized staff member has recently submitted an Account Update request, the following screen will display when logging into the Account Update website. You will need to wait for the existing request to be processed before submitting another Account Update request.

Update CAIR Organization Account - Site Information

This site (Org Code: 07CTEST) has pending update that was submitted on 04-12-2022 by PETER SEARLE. Once it has been processed you will be able to update your organization and users.

2. The 'Update CAIR Organization Account - Site Information' screen will display when logged in.

Your Name		Enter your full name. Authorized personnel filling out this form
Org ID Org Name	07CTEST CHERYLS TEST	
Address 1 🖸	855 MARINA BAY PKWY	Phone (530) 632 - 4600
Address 2 📀	STE 4	Fax (530) 632 - 8321
City	RICHMOND	ZIP 94804
Public Ora (er	a.Community Clinic) No 🗸	Code
Site Email	CHERYL SCOTT@CDPH.CA.GOV	Confirm Email
Conta <mark>c</mark> t First Name	CHERYL	Contact ()
Contact Last Name	SCOTT	
Data Exchange	Yes	
WIC Provider 🧕	No	VFC Provider
		VFC PIN • 888888
Organization Type	Pediatrics	If your Organization Type is incorrect please email us at <u>CAIRHelpDesk@cdph.ca.gov</u> before moving forward as this will affect the user levels of existing and new users at your site.
Responsible Lic	ensed Clinician:	
First Name as it	t appears on medical license * CHERYL	CA Medical License * 123456
Last Name as it	appears on medical license * SCOTT	License Type * Pharm V

3. Enter your full name as the person submitting the request in the 'Your Name' field. Confirm your organization's CAIR2 Primary Contact person's email address and phone number (see screenshot above).

Make additional edits as needed for any of the fields:

- Address: This is your organization's physical address. Update if your site moved locations, an incorrect address is listed, or the fields are blank.
 Note: There isn't a field to add/update your organization's 'Vaccine Delivery Address'. If you need to add/update this information in CAIR2, you will need to add a note in the 'Message/Special Instruction' text box that's located on the last screen of this request with your 'Vaccine Delivery Address' information to request it be added/updated in CAIR2. Further instructions are provided in the <u>CAIR Organization Update & User Access Agreement</u>.
- **Phone/Fax:** This is your organization's phone/fax. Update if your site has a new phone/fax number, incorrect number(s) listed, or the field(s) are blank.
- **Contact's information:** This is your organization's designated CAIR2 Primary Contact. Update if the contact listed is no longer the CAIR2 contact person and enter the new person's information here.

- VFC Provider/PIN (If applicable): If your site is enrolled in the Vaccines for Children (VFC) program, the 'VFC Provider' field should be marked 'Yes' along with your site's 'VFC PIN'. You can update the fields if any of the information is incorrect or missing.
- Responsible Licensed Clinician (If applicable): If your site is a clinical provider (i.e., provides routine vaccines), these fields must be completed with the clinician's full 'First Name', 'Last Name', 'CA Medical License' number, and 'License Type'.

Note: The responsible clinician listed must have an MD, DO, PA, NP, Pharm, DDS, DMD, ND, or NMD license type for the CAIR Help Desk to properly approve your Account Update request. If the National Provider Identifier (NPI) number or any other license type is listed (e.g., RN, LVN), your submission will be delayed until you provide information for a responsible clinician with the above license types.

- 4. Then click the **Continue** button to proceed to the next screen.
- 5. The 'CAIR Organization/Site Update' verification screen will display next.

Org/Site - Name:	CHERYLS TEST		
Address (line 1):	850 MARINA BAY PKWY	Phone:	(510)321-1231
Address (line 2):		Fax:	()-
City:	RICHMOND	ZIP Code:	94804
Public Org:	No		
Contact Name:	DANIELLE HODGE	Contact Phone:	(510)555-5555
Contact Email:	CHERYL.SCOTT@CDPH.CA.GOV		
VFC PIN:	888888		
Responsible Clinician's Full Name:	TEST TEST	Medical License:	654321 MD
Organization/Site Type:	School Clinic		

CAIR Organization/Site Update

6. If your org/site's address cannot be validated, a red message will appear that states, 'The address you have entered cannot be validated by the United States Postal Service'. If the address is incorrect, click the **Back** button to correct the address. However, if the address is correct, click the **Continue** button to proceed to the next screen.

Update Existing CAIR Users

Important Note: If your site has recently enrolled in CAIR2, this screen will not display as user accounts have yet to be requested (see screenshot below). The 'CAIR User Transfer/Additional Access' screen will display first. Proceed to <u>CAIR User Transfer/Additional Access</u> for further instructions.

On this screen, you can make updates to existing (active) users at your site, such as their 'Email' address and 'User Role'. See the <u>CAIR2 User Roles</u> chart to view the features for each user role. You can also inactivate users who are no longer at your organization by selecting the **Inactivate User** checkbox.

However, there is no option to update an existing user's name or username. If an existing user has had a name

change (e.g., recently married) or the information is incorrect (e.g., misspelled last name) and needs to update their name and/or username, you can request that the user's name and/or username is corrected by adding a note in the 'Message/Special Instruction' text box that's located on the last screen of this request. Further instructions are provided in the <u>CAIR Organization Update & User Access Agreement</u>.

Note: If no updates need to be done on this screen, click the click here link to proceed to the next screen.

Update Existing CAIR Users					
The Existing (Active) User Acco	The Existing (Active) User Accounts for this Org Code are listed below.				
 Please review the information for each User and update as needed. Before changing a user's role, review the <u>CAIR User Roles</u> to see what each role is allowed to do. If a user no longer works at this site, check the 'Inactivate User' box to inactivate their account. When you are done updating all users, click the 'Continue' button at the bottom of the screen. 					
If you DO NOT need to update any Existing Active Users <u>click here</u> .					
	Existing Users: 1 - 30 of 71				
Username: QASSURANCE User Description	n: QUIL ASSURANCE				
First Name* QUIL Last Name* ASS Email* MEGAN.BENSON@CDPH.CA.C User Role* • QA • Inactivate User					

- 1. The 'Update Existing CAIR Users' screen will display the first 30 existing (active) users at your site. The total number of existing users for the organization will be noted next to 'Existing Users:'. To see the remaining users, click the **Continue** button at the bottom of the screen.
- 2. If you made any changes on this screen and need to proceed to the next screen, click the **Continue** button at the bottom of the screen.

Note: If you are certain that a user has an account with CAIR2, but you do not see their information on this screen, add a note in the 'Message/Special Instruction' text box that's located on the last screen of this request. Further instructions are provided in the <u>CAIR Organization Update & User Access Agreement</u>.

Re-Activate User

If you need to re-activate an existing user's account at your org/site because they have been inactivated in the past, you can search for the user on this screen and re-activate their account.

Note: If no updates need to be done on this screen, click the **click here** link to proceed to the next screen.

Re-Activate User

To re-activate an existing user at your site:

- 1. Enter the User's first and last name below and click the 'Search' button.
- 2. When their name appears, complete the required information.
- 3. Check the 'Reactivate this User' box.
- 4. Click the 'Submit' button.
- 5. Repeat this process for each user you need to re-activate.

If you Do NOT need to re-activate any Existing Inactive Users click here.

First Name:	Last Name:
	Search

- 1. Enter the user's 'First Name' and 'Last Name' and click the Search button.
- If there is a match, additional fields will display at the bottom of the screen (see screenshot below).
 Complete the user's 'First Name', 'Last Name', 'Email' address, and 'User Role Requested'. Then select the Re-activate this user checkbox and click the Submit button.

Note: If there is no match, the message 'There are no Users matching your criteria' will display at the bottom of the screen. If you are certain that a user previously had an account with CAIR2, but you get this message, add a note in the 'Message/Special Instruction' text box that's located on the last screen of this request. Further instructions are provided in the <u>CAIR Organization Update & User Access Agreement</u>.

Please complete the remaining information needed and check the re-activate box for the account you would like to Re-Activate.

User ID:	DAUTI	Provider ID:	07CTEST	User Description:	Deepa Auti
First Nam Email:	e:		La	ast Name: User Role Request	ed 🛛 Choose One 🗸
🗆 Re-act	ivate this	user			

3. Continue to re-activate additional users if needed. When finished, click the **click here** link to proceed to the next screen.

CAIR User Transfer/Additional Access

Important Note: If your site has recently enrolled in CAIR2, this is the first screen you will see after the 'CAIR Organization/Site Update' screen.

If you know that a staff member had a CAIR2 account at another site, use the 'CAIR User Transfer/Additional Access' screen for the following:

• If you need to transfer an existing user from another site to your site (e.g., no longer works at the previous site they had CAIR2 access).

• If you need to add an existing user to your site in addition to their current site (e.g., works at multiple sites/locations and needs CAIR2 access for your site).

Note: If no updates need to be done on this screen, click the **<u>click here</u>** link to proceed to the next screen.

CAIR User Transfer/Additional Access

You can use this screen to:

- Transfer an existing user from one site to another site (i.e., move account).
- Add an existing user to a site in addition to their current site (i.e., add to an additional site).

NOTE: You must know both the user's current/previous Org Code and the Org Code you wish to transfer/Add the user to.

To transfer or add a user to an additional site:

1. Fill in all of the fields below.

- 2. If you are <u>Transferring</u> a user, choose 'Yes' in the 'Inactivate From Login Org Code' field (this will inactivate the user's account at the current/previous site).
- 3. If you are <u>Adding</u> a user to another site, choose 'No' in the 'Inactivate From Login Org Code' field (this will keep the user's account Active at the current/previous site).
- 4. To Transfer/Add more users, click the 'Add Additional User' button (you can transfer/add up to 5 users at a time).
- 5. When you are done transferring/adding users, click the 'Continue' button.

If you Do NOT need to Transfer/Add a user to an additional site click here.

Transfer Users/Additional Access

Previous/Current Org Code Username	Transfer/Add 07CTEST Access to Org Code
First Name	Last Name
Inactivate From Choose One ~ Previous/Current Org Code?	Ke-type Email
Transfer/Add Access	Continue

- 1. Complete all the fields on the screen:
 - Previous/Current Org Code: Enter the Org Code the user previously or currently has access to.
 Note: If the user does not know their 'Previous Org Code', contact the CAIR Help Desk for assistance in providing this information for the user.
 - **Username:** Enter the user's username that was assigned to them at the Org Code you entered in the 'Previous/Current Org Code' field.
 - First and Last Name: Enter the user's first and last name.
 - Email and Re-type Email: Enter the user's current email address in both fields.
 - Inactivate From Previous/Current Org Code?:
 - Select No if you are adding the user to your site (i.e., they will continue to have access at the other site).
 - Select Yes if you are transferring the user's account to your site (i.e., they no longer work at the previous site).

- 2. Click the **Transfer/Add Access** button if additional users need to be transferred/added to your site. Up to 5 users can be included in your request.
- 3. Click the **Continue** button when you are finished requesting transfers/additional access to proceed to the next screen.

New CAIR User Account

If your staff has never had an existing user CAIR2 account in the past at another organization, you can request new CAIR2 user accounts for your staff on this screen. However, if the staff member previously had a CAIR2 user account at another site, **Do Not** request a new account for them. Simply follow the steps in <u>CAIR User</u> <u>Transfer/Additional Access</u> to request that their existing user account be transferred or added to your site.

If the authorized staff/contact submitting the Account Update request will also need access to CAIR2, they must request their own account on this screen. Access to CAIR2 is not automatically provided unless requested on this screen.

Note: If no updates need to be done on this screen, click the **click here** link to proceed to the next screen.

New CAIR User Account					
This screen is for adding new users that do not have an existing user account					
To add a New User to your site:					
 Enter their name and email address below. Before selecting their User Role, review the <u>CAIR User Roles</u> to see which user role is most appropriate for them. To add more New Users, click the 'Add Additional User' button (you can add up to 10 new users at a time). When you are done adding all new users, click the 'Continue' button. 					
IMPORTANT NOTE: If any of these new Users will also be administering vaccines, you must also add them as Shotgivers on the upcoming `Add New Shotgiver' screen, so that they appear in the `Administered By' dropdown menu when recording a shot in CAIR".					
If you Do NOT need to add any New Users <u>click here.</u>					
New Users					
First Name* Last Name* Email* Re-type Email* User Role Requested* Choose One					
Add Additional User					

- 1. Enter/select the user's 'First Name', 'Last Name', 'Email' address, and 'User Role Requested'. See the CAIR2 User Roles chart to view the features for each user role.
- If you need to request new CAIR2 user accounts for additional staff, click the Add Additional User button. Up to 10 users can be included in your request.

- 3. After adding your new user(s) information, click the **Continue** button to proceed to the next screen.
- 4. The 'New CAIR User Account(s)' screen will display next. Confirm the information you entered for your users is correct before proceeding to the next screen. If the information is incorrect, click the **Back** button to correct the information. If the information is correct, click the **Continue** button to proceed to the next screen.

New CAIR User Account(s)					
Please check the information that you have entered. If incorrect, click the 'Back' button to make changes. If correct, click the 'Continue' button .					
Last Name: CORADO Email: KCORADO@PH.LACOUNTY.GOV User Type Requested: Read Only	First Name: KARLA				
Back Continue					

Update Existing Shotgivers

Important Note: For sites that have clinical access to CAIR2, this screen will only appear if you have existing shotgivers. If not, you will see the 'Add New Shotgiver' screen. Proceed to <u>Add New Shotgiver</u> for further instructions.

Shotgivers are staff members who administer vaccines to patients. Shotgivers' names will appear in the 'Administered By' drop-down list in CAIR2 for your site when you document a newly administered dose in your patient's CAIR2 record. Existing shotgivers for your site will display on this screen, but you can only update the shotgivers' 'Title'. There is no option to remove a shotgiver or edit their first and last name.

If you need to have shotgiver(s) removed or their first and/or last name updated, you can request the update by adding a note in the 'Message/Special Instruction' text box that's located on the last screen of this request. Further instructions are provided in the <u>CAIR Organization Update & User Access Agreement</u>.

Note: If you have a large list of shotgivers that need to be updated, contact your <u>Local CAIR Representative</u> (<u>LCR</u>) for assistance.



	Update Existing Shotgivers
	Shotgivers are your staff members who administer vaccines to patients. Their names appear in the 'Administered by' dropdown field in CAIR to record that they gave the shot. The Existing Shotgivers for this Org Code are listed below. 1. Please review the information for each Shotgiver and update as needed. 2. When you are done updating all Shotgivers, click the 'Continue' button at the bottom of the screen. If you DO NOT need to update any Existing Shotgivers <u>click here.</u>
	Existing Clinician(s): 1 - 13 of 13 Clinician: PAM CUNNINGHAM, MA
1	Click on the Title drondown and chaose the shotgivers' 'Title' from the list

- 2. Continue updating shotgivers' titles if needed.
- 3. When you have completed updating titles, click the **Continue** button to proceed to the next screen.

Add New Shotgiver

Shotgivers are staff members who administer vaccines to patients. Shotgivers' names will appear in the 'Administered By' drop-down list in CAIR2 for your site, as described above in the 'Update Existing Shotgivers' section.

Important Note: Adding a shotgiver in Account Update will not give them access to CAIR2 and allow them to log in as a user. If your shotgivers also need to log into CAIR2 and document patient data, go back and add them on the <u>New CAIR User Account</u> screen. If you are a Data Exchange (DX) site, you **Do Not** need to request shotgivers because they are included in the DX file your site sends to CAIR2 when administered shots are recorded in your EHR/EMR system.

Note: If no updates need to be done on this screen, click the **DO NOT** link to proceed to the next screen

Add	New	Sho	tai	/er
			- 9	_

Shotgivers are staff members who give shots, or administer vaccines to patients. Their name will appear in the 'Admin by' dropdown in CAIR2 for this site.

*PLEASE NOTE that this will not give them access to CAIR and allow them to log in as a user. If you need them to be added as a user, please go back and add them on the `Add New CAIR User Account' page of this form.

If you do not need to add any new Shotgivers please click the link below.

I DO NOT need to add new Shotgivers.

New Clinicians(ShotGivers)

Title*		~	First Name*			Last Name*	
-							
Additional	Clinician					4	
				(Continue		

- Enter/select the 'Title', 'First Name', and 'Last Name' of the shotgiver(s) from your organization who administer vaccines. Adding them as shotgivers will ensure their names appear in the 'Administered By' dropdown list in CAIR2. Note: If shotgivers need access to log into CAIR2, a user account needs to be requested for them.
- 2. Click on the **Additional Clinician** button to add additional shotgivers. Up to 10 shotgivers can be included in your request.
- 3. After adding your new shotgiver(s), click the **Continue** button to proceed to the next screen.

CAIR Organization Update & User Access Agreement

This is the final screen before submitting your Account Update request (see screenshot below). Read the information before completing the fields and submitting.

Note: Per California law, all providers entering information into CAIR2 are required to disclose to patients or their parents/guardians that they use CAIR2. Refer to the <u>CAIR Disclosure/Sharing Policy webpage</u> for more information. Patients/parents/guardians have the right to share their/their child's CAIR2 records with **all** CAIR2 providers or **only those providers who are administering vaccinations to them and/or require vaccination history to provide medical care.** In addition, state law AB1797 requires that **all** vaccinations given to the patient, their race/ethnicity, and TB test results be entered into CAIR2. Refer to the <u>AB 1797</u> <u>Immunization Registry FAQs webpage</u> for more information.

CAIR Organization Update & User Access Agreement

CAIR Providers/Organization Terms & Conditions

The California Immunization Registry (CAIR) is a secure, computerized online information system developed to assist medical providers and other approved agencies to track and review immunization information and TB test results for individuals, assess immunization needs and remind/recall patients, avoid unnecessary or redundant immunizations, and control disease outbreaks. Information in CAIR is only available to authorized users. Based on the access level approved, this Agreement will allow the Organization to access, view, add, or modify immunization information/TB test results in CAIR either via the web interface or through electronic data exchange under the conditions listed below. As conditions for participating in CAIR, the above Organization agrees to:

- Comply with California Health and Safety Code Section 120440 regarding immunization registry use, as well as State and Federal laws and HIPAA regulations regarding maintaining the confidentiality of patient information.
- Ensure your Organization staff receive appropriate CAIR training prior to accessing information in CAIR.
- Access information in CAIR only as needed to perform immunization/TB-related activities for individuals presenting to your Provider/Organization for services.
- · Safeguard and ensure no sharing of assigned passwords.
- · Ensure no misuse or wrongful disclosure of information in CAIR by your Organization staff.
- Disclose to patients or their parents/guardians that state law requires patient immunization information and TB test
 results to be shared with CAIR and that patients have the option to share their immunization records/TB test results
 with all CAIR providers or only providers that require vaccination history to provide care. Written disclosure is highly
 recommended.
- Report any activity that may compromise the protection and privacy of the information in CAIR.

CAIR Individual User Terms & Conditions

California Health and Safety Code Section 120440 limits access to the California Immunization Registry (CAIR) to authorized users who require the information for the purpose of providing immunization services as specified.

As a condition of authorized access to the California Immunization Registry, I agree:

- · To only access and use the registry system in the course of my assigned duties for the purpose stated above.
- To keep my user password confidential.
- · To only use my own password to access to the registry.
- To maintain the privacy and confidentiality of information in the registry.
- To not communicate, publish and/or otherwise provide or make public any information regarding persons enrolled in the registry and their immunization status, except:
 - 1. To patients who request their own immunization records,
 - 2. To individuals authorized by law to access immunization registry information, or
 - 3. When records are presented in aggregate reports and have no associated identifying information.

To assure appropriate usage of CAIR, a permanent electronic record will be created that will log each User's access into any registry client record. Any unauthorized release of confidential information by a User may revoke my or my Organization's access to the California Immunization Registry (CAIR). User accounts will be inactivated by CAIR staff if a User fails to login to CAIR for a period of 3 months.

Organization	Representative
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By cha all list Organ that ti this A Agree	ecking this box and entering ed Users associated with th ization/Site closes or is bou he existing Organization/Sit greement if the Organizatio ment will remain in effect u	your name below, you as the Organization Representative agrees that the Organization and e Organization have read and will abide by the CAIR rules set forth in this Agreement. If the ght by another Organization, the Organization/Site must inform CAIR staff within 14 days so e and user accounts can be terminated or reassigned. CAIR reserves the right to terminate n or it's Users violate this Agreement or use the system in an unauthorized manner. This ntil terminated by either party.					
	Full Name *: Title *: Email Address *: Contact Number *:						
To leave a message or special instructions for your CAIR Help Desk Representative enter below.							
(Maxi	mum characters: 500). You have	Submit my Organization and User Account Information					

- 1. After reading the agreement, select the checkbox and complete the required fields. You can also leave a message or special instructions for your CAIR Help Desk Representative in the text box provided. Some examples of messages include:
 - Adding/updating your organization's Vaccine Delivery address
 - Updating an existing user's name and/or username
 - Notifying an existing user is missing on the 'Update Existing CAIR Users' screen
 - Re-activating a previous user at your site you were unable to find on the 'Re-Activate User' screen
 - Removing existing shotgiver(s)
 - Editing an existing shotgiver's first and/or last name
 - Any additional update requests you couldn't update (i.e., there was not a field/screen to update the information)
- 2. Then click the **Submit my Organization and User Account Information** button at the bottom of the screen to submit your Account Update request(s).
- The message 'Information has been successfully submitted' will display, and a confirmation email will be sent to the person listed as the contact for the site on the 'Update CAIR Organization Account - Site Information' screen. If you have any questions about the status of your request, contact the CAIR Help Desk at 1-800-578-7889 or by email at <u>CAIRHelpDesk@cdph.ca.gov</u>.