



CAIR2 Guide to Using the Manage Patient Status Feature

Revised: 02/12/2025

This guide describes how to use the Manage Patient Status feature in CAIR2. This feature allows users to generate a group of patients who have received immunization-related services from your site and update their status in batch loads. This feature is available to users with Regular, Power, School Clinic Regular, School Clinic Power, WIC, Health Plans, and QA user roles.

For additional support, the following resources are available:

[Local CAIR Representatives \(LCRs\)](https://go.cdph.ca.gov/cair-lcr): (go.cdph.ca.gov/cair-lcr)

CAIR Help Desk:

Phone: 800-578-7889

Email: CAIRHelpDesk@cdph.ca.gov

[CAIR Website](https://cdph.ca.gov/cair): (cdph.ca.gov/cair)

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Section 1: Introduction to the Manage Patient Status Feature

The Manage Patient Status feature in CAIR2 allows you to generate a group of patients who have received immunization-related services from your site to update their status. Within the group, you can change each patient's status (e.g., Active, Inactive-Lost to follow-up, Inactive-No longer a patient, etc.) without having to go into each patient's individual CAIR2 record to make the change.

Using the Manage Patient Status feature to inactivate patients who are no longer active at your practice removes them from your CAIR2 immunization coverage reports and reminder/recall reports, making these reports more accurate and, therefore, more useful. **Please note that inactivating patients in CAIR2 only removes them from your reports but not from CAIR2.**

To assist the review process, your patients can be grouped using various criteria, such as current active/inactive status, age, time since they last received an immunization from your site, and patients' last name.

The five patient statuses available via the Manage Patient Status Feature are:

- Active
- Inactive-Unspecified
- Inactive-Lost to follow-up
- Inactive-No longer a patient
- All

Note: There are two status options that can only be selected within an individual patient record, not through the Manage Patient Status feature. They are 'Inactive-Permanently (Deceased)' and 'Unknown' (see [Changing the Status in an Individual Patient's Record section](#)).

Your site should establish internal policies for different age groups to determine when to 'inactivate' a patient and when to leave a patient as 'Active' in CAIR2. For this, you may want to consider when they are due for their next shots. For example, adolescents and adults may not be due for shots for longer periods of time (e.g., annually) as opposed to young children, who may be due every few months. In these cases, you may want to keep adolescents/adults active in CAIR2 at your site for longer periods of time, even if they have not received vaccines recently.

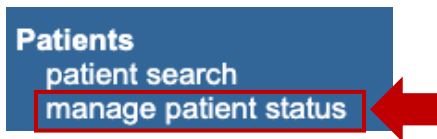
In addition, your site should also establish an internal policy on when to use a specific status – for example, when to designate a patient as 'Inactive-No longer a patient' versus 'Inactive-Lost to follow-up'.

Important Note: We encourage you to review each individual patient on the list generated from CAIR2 before inactivating the entire group, in case some patients should still be considered active even though they may not have been to your practice recently for vaccination.

Section 2: Accessing the Manage Patient Status Feature

To access the Manage Patient Status feature:

1. Log into CAIR2: [CAIR2 Login screen](https://cair.cdph.ca.gov) (cair.cdph.ca.gov).
2. Click the **manage patient status** link on the left blue menu panel.



3. The 'Manage Patient Status Criteria' screen will display.

This screen allows you to set the criteria for generating a group of patients. Options include:

- **Select By Status (required):** Generating a group based on patients' current 'Active'/'Inactive' status in CAIR2 (see [Generating a Group of Patients by Status section](#)).
- **Select By Age (required):** Generating a group based on patients' age (or 'Birth Date Range') of patients (see [Generating a Group of Patients by Birth Date Range section](#)).
- **Select By Length of Time Since Last Immunization (optional):** Generating a group by the last time your site gave the patients an immunization (see [Generating a Group of Patients by Length of Time Since Last Immunization section](#)).
- **Select By Last Name (optional):** Generating a group based on patients' 'Last Name' (see [Generating a Group of Patients by Last Name section](#)).

Note: Depending on the criteria you select to generate a group of patients will determine how large or small your results will be. It is recommended to narrow your criteria to work in smaller batches rather than all patients simultaneously. You can choose a status, an age range, a length of time since their last immunization, and/or a last name range in any combination.

Section 3: Generating a Group of Patients by Status

To generate a group of all patients associated with your organization by their current Status:

1. Choose a status radio button in the 'Select By Status' section. Only **one** status can be selected at a time. The default is 'Active'. **Note:** If you select the 'All' status radio button, you will see a list of **all** patients associated with your site in CAIR2.
2. Leave the 'Select By Age' defaulted to **All Ages** and all other fields blank. Then click the **Find** button at the top right of the screen.

Manage Patient Status Criteria

***Select By Status**

☒ Active ☐ Inactive-Unspecified ☐ Inactive-Lost to follow-up
☐ Inactive-No longer a patient ☐ All

***Select By Age**

☒ All Ages
☐ Birth Date Range Earliest Birth Date Latest Birth Date

Select By Length of Time Since Last Immunization

Years Months Evaluation Date (if blank, default date is current date)

Select By Last Name

Last Name Last Name Begin Range Last Name End Range

Find

3. At the bottom of the screen, you will see a group of all patients with the status you selected listed alphabetically by last name. For example, if you selected 'Active', the list will contain all patients in CAIR2 that currently have an 'Active' status with your site under the 'Current Status' column. **Note:** The note in the red font will show the total number of patients for your criteria selected (i.e., **Patient Status Result Set Returned 1-16 of 16**).

Patient Status Result Set Returned 1-16 of 16						
Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status	
<input checked="" type="checkbox"/> All						
<input type="checkbox"/>	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE	
<input type="checkbox"/>	ALMOND	JOY	06/01/2000	6423884	ACTIVE	
<input type="checkbox"/>	AZAIR	HELEN	06/01/2015	6423885	ACTIVE	
<input type="checkbox"/>	CASTRO	JAMIE	04/12/2002	6423471	ACTIVE	
<input type="checkbox"/>	DANNA	ANNA	04/12/2002	5306038	ACTIVE	

The screen contains:

- **Page Select/Deselect:** This includes a checkbox to select all patients or specific individual patients to change their status.
- **Last Name, First Name, Birth Date, CAIR ID:** This includes the patient's information.
- **Current Status:** The patient's current status in CAIR2 for your site.

For instructions on how to change patients' status on this screen, see the [Changing the Status of One or Multiple Patients section](#) of this guide.

Section 4: Generating a Group of Patients by Birth Date Range

Using a 'Birth Date Range' is a helpful way to narrow the number of patients that display, especially if you want to focus on a specific age group (e.g., young children).

To generate a group of all patients associated with your organization by Birth Date Range:

1. Choose a status in the 'Select By Status' section.
2. Select the **Birth Date Range** radio button in the 'Select By Age' section, enter a date range in MM/DD/YYYY format, or select a date using the calendar. **Note:** The 'Earliest Birth Date' and 'Latest Birth Date' fields are required.
3. Leave all other fields blank and click the **Find** button at the top right of the screen.
4. At the bottom of the screen, you will see a group of all patients with the status you selected within that 'Birth Date Range'.

Example below: Based on the criteria entered, the group that displays includes five patients currently listed as 'Active' for the site and born within the 'Birth Date Range' of 01/01/2014 – 01/01/2015.

Manage Patient Status Criteria

***Select By Status**

☒ Active ☐ Inactive-Unspecified ☐ Inactive-Lost to follow-up ☐ Inactive-No longer a patient ☐ All

***Select By Age**

☒ Birth Date Range ☐ All Ages

Earliest Birth Date 01/01/2014 Latest Birth Date 01/01/2015

Select By Length of Time Since Last Immunization
Years Months Evaluation Date (if blank, default date is current date)

Select By Last Name
Last Name Last Name Begin Range Last Name End Range

New Status Value

Save Cancel

Patient Status Result Set Returned 1-5 of 5

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input checked="" type="checkbox"/> All					
<input type="checkbox"/>	JONES	JACK	01/01/2014	6423878	ACTIVE
<input type="checkbox"/>	JONES	JEN	01/02/2014	6423879	ACTIVE
<input type="checkbox"/>	KIRTLE	KARMEN	06/01/2014	6423880	ACTIVE
<input type="checkbox"/>	LOOPS	FRUIT	02/07/2014	6423881	ACTIVE
<input type="checkbox"/>	MALI	CHRISTOPHER	01/01/2015	6423882	ACTIVE

For instructions on how to change patients' status on this screen, see the [Changing the Status of One or Multiple Patients section](#) of this guide.

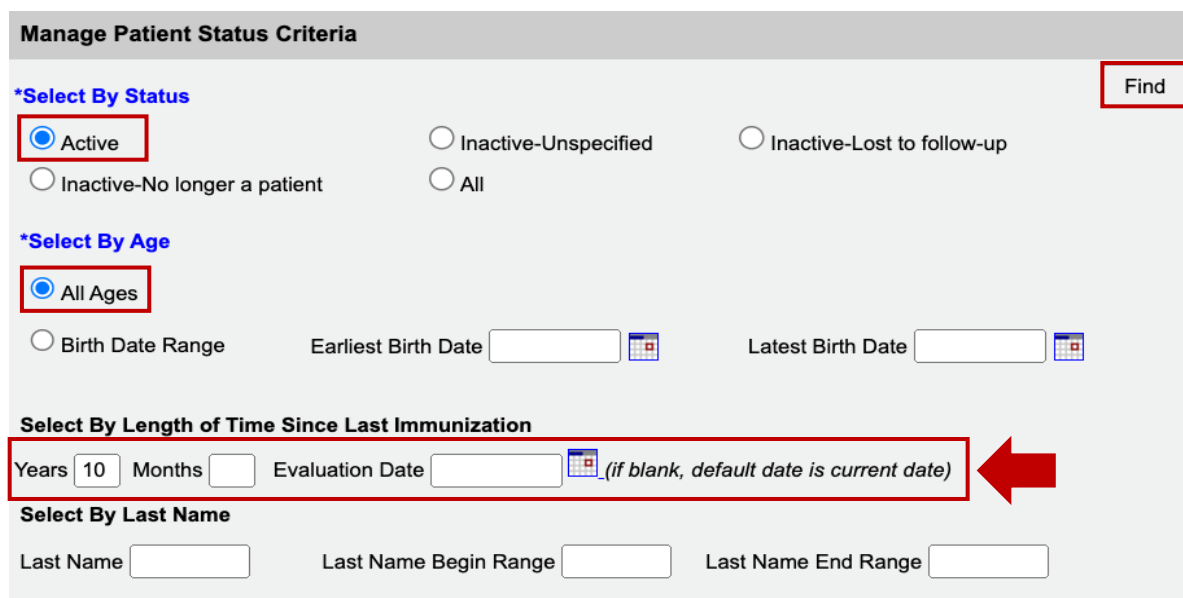
Section 5: Generating a Group of Patients by Length of Time Since Last Immunization

Using the 'Select by Length of Time Since Last Immunization' field is a helpful way to narrow the number of patients that display, especially if you want to focus on patients that have not received an immunization from your site in a long time (e.g., in the past two years).

To generate a group of all patients associated with your organization by status and the length of time since your site last gave the patient an immunization:

1. Choose a status in the 'Select By Status' section and an age option in the 'Select By Age' section. **Note:** If you want to focus on a specific age group (e.g., young children), enter a 'Birth Date Range' (see [Generating a Group of Patients by Birth Date Range section](#)).
2. Enter the time you want to set for the last time the patient received an immunization from your site in the **Years** and/or **Months** fields. **Note:** 'Years' and 'Months' can be used in combination with each other or used separately.
3. Enter an **Evaluation Date**. The 'Evaluation Date' is calculated from the number of 'Years' and/or 'Months' entered. **Note:** If you leave this field blank, it will default to today's date.
4. Click the **Find** button at the top right of the screen.
5. At the bottom of the screen, you will see a group of all patients with the status, age option, and length of time since the last immunization you selected.

Example below: Based on the criteria entered below, the group that will display will include patients who are currently listed as 'Active' for the site, of 'All Ages', and who haven't received an immunization from the site in 10 years as of today's date ('Evaluation Date' field left blank).



The screenshot shows the 'Manage Patient Status Criteria' form. A red box highlights the 'Active' radio button under '*Select By Status'. Another red box highlights the 'All Ages' radio button under '*Select By Age'. A third red box highlights the 'Years' field with the value '10' and the 'Evaluation Date' field, which is empty. A red arrow points to the 'Find' button in the top right corner. A fourth red arrow points to the 'Evaluation Date' field, with the text '(if blank, default date is current date)' next to it.

Manage Patient Status Criteria

***Select By Status**

☒ Active ☐ Inactive-Unspecified ☐ Inactive-Lost to follow-up
☐ Inactive-No longer a patient ☐ All

***Select By Age**

☒ All Ages ☐ Birth Date Range

Earliest Birth Date Latest Birth Date

Select By Length of Time Since Last Immunization

Years Months Evaluation Date (if blank, default date is current date)

Select By Last Name

Last Name Last Name Begin Range Last Name End Range

Note: The patients listed may have received immunizations from other providers during this timeframe (e.g., in the last 10 years).

For instructions on how to change patients' status on this screen, see the [Changing the Status of One or Multiple Patients section](#) of this guide.

Section 6: Generating a Group of Patients by Last Name

Using the 'Select by Last Name' field is a helpful way to narrow down the number of patients that display, especially if you want to do several smaller batches at a time.

There are several ways to search for patients by 'Last Name':

- A specific last name (e.g., 'Jones') is helpful if you are looking for a specific family.
- A more extensive list based on a partial last name (e.g., all last names starting with 'Jo').
- A last name range (e.g., all last names that start 'Aa' through 'Az', will give you a list of all patients with last names that begin with the letter 'A'). A minimum of 2 letters is required.

To generate a group of all patients associated with your organization by Last Name range:

1. Choose a status in the 'Select By Status' section and leave the 'Select By Age' option defaulted to **All Ages** unless you want to narrow the list further (see [Generating a Group of Patients by Birth Date Range section](#)).
2. (Optional) Enter criteria for 'Select By Length of Time Since Last Immunization' if you want to narrow the list further (see [Generating a Group of Patients by Length of Time Since Last Immunization section](#)). Otherwise, leave it blank.
3. Enter a **Last Name** or **Last Name (Begin/End) Range** in the 'Select By Last Name' section.
4. Click the **Find** button at the top right of the screen.
5. At the bottom of the screen, you will see a group of all patients with the last name/range entered and criteria selected.

Example 1: Based on the criteria entered below, the group displayed includes two patients currently listed as 'Active' for the site, of 'All Ages', with the last name 'Jones' (see screenshot below).

Manage Patient Status Criteria

*Select By Status

☒ Active
☐ Inactive-Unspecified
☐ Inactive-Lost to follow-up
☐ Inactive-No longer a patient
☐ All

*Select By Age

☒ All Ages
☐ Birth Date Range

Select By Length of Time Since Last Immunization

Years Months Evaluation Date (if blank, default date is current date)

Select By Last Name

Last Name
Last Name Begin Range
Last Name End Range

New Status Value

Save Cancel

Patient Status Result Set Returned 1-2 of 2

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input type="checkbox"/> All	JONES	JACK	01/01/2014	6423878	ACTIVE
<input type="checkbox"/>	JONES	JEN	01/02/2014	6423879	ACTIVE

Example 2: Entering **JO** in the ‘Last Name’ field will generate a group of all patients with a last name starting with ‘JO’. **Reminder:** A **minimum** of 2 letters is required.

Select By Last Name

Last Name

Last Name Begin Range

Last Name End Range

New Status Value

Save Cancel


Patient Status Result Set Returned 1-6 of 6

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input type="checkbox"/> All	JOHN	FIONA	04/12/2002	5950337	ACTIVE
<input type="checkbox"/>	JOHNSON	BECKY	05/23/2007	205	ACTIVE
<input type="checkbox"/>	JONAH	HILL	11/25/2006	328	ACTIVE
<input type="checkbox"/>	JONES	JACK	01/01/2014	6423878	ACTIVE
<input type="checkbox"/>	JONES	JEN	01/02/2014	6423879	ACTIVE
<input type="checkbox"/>	JORDAN	ANDERSON	04/16/2008	214	ACTIVE

Example 3: Entering **AA** in the ‘Last Name Begin Range’ and **AZ** in the ‘Last Name End Range’ will generate a group of all patients whose last name begins with the letter ‘A’ (see screenshot below).

Select By Last Name

Last Name

Last Name Begin Range Last Name End Range 

New Status Value

Patient Status Result Set Returned 1-3 of 3

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input type="checkbox"/> All					
<input type="checkbox"/>	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
<input type="checkbox"/>	ALMOND	JOY	06/01/2000	6423884	ACTIVE
<input type="checkbox"/>	AZAIR	HELEN	06/01/2015	6423885	ACTIVE

For instructions on how to change patients' status on this screen, see the [Changing the Status of One or Multiple Patients section](#) of this guide.

Section 7: Changing the Status of Patients Via Data Exchange

If your site is sending vaccine information electronically to CAIR2 via an EHR/EMR system, patient status changes can be sent via your Data Exchange files.

Verify with your EHR/EMR vendor if your site is currently sending patient status to CAIR2 or if your EHR/EMR system has the capability to send the information.


Contact CAIR Data Exchange: CAIRDataExchange@cdph.ca.gov if you have questions or need assistance validating the testing for patient status.

Section 8: Changing the Status of One or Multiple Patients

Once you have generated your group based on the criteria you selected, you can change the status of any or all of the patients displayed.

Note: If your results include fewer than 100 patients, they will all display on the same screen, and you will see a red message indicating the number of patients in your results.

New Status Value

Patient Status Result Set Returned 1-21 of 21 

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input type="checkbox"/> All					
<input type="checkbox"/>	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
<input type="checkbox"/>	ABBOTT	ISAIS	08/15/2002	6427553	ACTIVE
<input type="checkbox"/>	ALMOND	JOY	06/01/2000	6423884	ACTIVE
<input type="checkbox"/>	ARRELLANO	MAYA	03/08/2013	6427544	ACTIVE
<input type="checkbox"/>	ARRELLANO	SAVANAH	08/16/2010	6427545	ACTIVE
<input type="checkbox"/>	AVALOS	ENOCH	05/24/2000	6427549	ACTIVE

Important Note: If your results include more than 100 patients, they will appear on multiple pages. You must work on each page before moving to the next one. You must change the status and click **Save** for the patients on that page. Then, you have to click **Next** to go to the next page to view more patients and repeat the process. You can also return to a previous page by clicking **Previous**.

New Status Value Save Cancel

Patient Status Result Set Returned 101-200 of 399 [«Previous](#) [Next»](#)

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input type="checkbox"/> All	DE LA HOYA	PRISCILLA	08/25/2004	213	ACTIVE
<input type="checkbox"/>	DEVIL	CRUELLA	01/01/2001	286	ACTIVE
<input type="checkbox"/>	DI	AMY	04/12/2002	5917747	ACTIVE
<input type="checkbox"/>	DIAZ	ERNESTO	05/17/2003	209136	ACTIVE
<input type="checkbox"/>	DIAZ	GRACE	04/12/2002	5955102	ACTIVE

To change the status of one or multiple patients:

- After you have reviewed all of the patients on the screen, choose the **New Status Value** you want to change these patients to by using the 'New Status Value' dropdown. **Reminder:** If you need to select either the 'Inactive-Permanently (Deceased)' or 'Unknown' status option for a patient, you can **only** select these within an individual patient record (see [Changing the Status in an Individual Patient's Record section](#)).

New Status Value Save Cancel

Patient Status Result Set Returned 1-21 of 21

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input type="checkbox"/> All	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
<input type="checkbox"/>	ABBOTT	ISAIS	08/15/2002	6427553	ACTIVE

- Once you have chosen a New Status Value, you have two options:
 - If you want to change the status of **all** patients on the current page you are viewing to the new status, select the **All** checkbox and then click the **Save** button.

New Status Value Save Cancel

Patient Status Result Set Returned 1-21 of 21

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input checked="" type="checkbox"/> All	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
<input checked="" type="checkbox"/>	ABBOTT	ISAIS	08/15/2002	6427553	ACTIVE
<input checked="" type="checkbox"/>	ALMOND	JOY	06/01/2000	6423884	ACTIVE
<input checked="" type="checkbox"/>	ARRELLANO	MAYA	03/08/2013	6427544	ACTIVE
<input checked="" type="checkbox"/>	ARRELLANO	SAVANAH	08/16/2010	6427545	ACTIVE
<input checked="" type="checkbox"/>	AVALOS	ENOCH	05/24/2000	6427549	ACTIVE

- b) If you only want to change the status of **specific** patients on the current page you are viewing to the new status, select the checkbox next to their name and then click the **Save** button.

New Status Value Inactive-No longer a patient Save Cancel

Patient Status Result Set Returned 1-21 of 21

Page Select/Deselect	Last Name	First Name	Birth Date	CAIR ID	Current Status
<input checked="" type="checkbox"/>	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
<input type="checkbox"/>	ABBOTT	ISAIS	08/15/2002	6427553	ACTIVE
<input checked="" type="checkbox"/>	ALMOND	JOY	06/01/2000	6423884	ACTIVE
<input checked="" type="checkbox"/>	ARRELLANO	MAYA	03/08/2013	6427544	ACTIVE
<input type="checkbox"/>	ARRELLANO	SAVANAH	08/16/2010	6427545	ACTIVE

3. Once you click the **Save** button, a pop-up message will display showing the total number of patients you selected to change their status. If you are sure you want to change the status for the selected patients, press the **OK** button; otherwise, press the **Cancel** button.

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Count of patients selected for status update to 'Inactive-No longer a patient' = 3. Are you sure you want to update these patients status values? Press 'OK' to update; otherwise, press 'Cancel'.

Cancel OK

4. Once you click the **OK** button, the patients will automatically be updated to reflect the new status selected for them.

Reminder: If you have more than 100 patients on your list, click the **Next** hyperlink to see the next batch of patients in your group. Repeat the steps above until you have completed the group. **These steps apply to every mode for generating a group.**

If you want to see a list of all patients with the new status: Generate a new list selecting the status you changed patients to. For example, if you changed the status of a group of patients from 'Active' to 'Inactive-No longer a patient', run a new group selecting the **Inactive-No longer a patient** status. All patients currently listed with this status will display, including the ones you recently changed. **Note:** If you mistakenly changed the status of a patient, you can select that patient on the list and change it back to the correct status.

Section 9: Changing the Status in an Individual Patient's Record

As a reminder, you can change a patient's status without using the Manage Patient Status feature. You can do this by searching for the individual patient in CAIR2 and changing their status within their record.

To change a patient's status within their CAIR2 record:

1. Log into CAIR2, search for the patient, and open the patient's record (see the **CAIR2 Regular User Guide** found on the [CAIR2 User Guides Page](#) for more information).

2. On the 'Update Patient' screen that displays, click on the **Organization Information** tab and update the patient's status in the **Status** dropdown. Click the **Save** button in the upper right-hand corner.

Update PatientCAIR ID : 5023

Personal Information

* Last NameMILLER

* First NameMARIE

Middle Name

Suffix

* Birth Date08/16/2010

Mother's Maiden LastMILLER

Mother's First NameJILL

* GenderFemale

Medi-Cal ID

Birth Order(for multiple births)

Birth CountryUNITED STATES

Birth State

Birth County

Medical Record Number

Save

History/Recommend

Reports

Cancel

Last Updated by CAIR CLinic 9 on 11/07/2024

Patient AKA (0)

Organization Information

[\[back to top\]](#)

Status

Provider- PCP

* Tracking Schedule

Remove MRN

Add Medical Record Number

✓ ACTIVE

Inactive-Lost to follow-up

Inactive-No longer a patient

Inactive-Permanently (Deceased)

Inactive-Unspecified

Unknown

Allow Reminder and Recall Contact? Yes

Last Notice

Primary

No Medical Record Numbers have been added for this patient.

Add Medical Record Number

Medical Record Number

Add Medical Record Number