CAIR2 Regular User Guide

Revised: 02/03/2025

The purpose of this User Guide is to provide an overview of the California Immunization Registry (CAIR2) and how to use the features available to CAIR2 Regular users.

For sites using CAIR2 Data Exchange (DX) to send patient information directly to CAIR2 from your EHR/EMR: Most/all the information in this guide can be sent/updated in CAIR2 via your electronic Data Exchange files; therefore, you will not need to enter/update this information in CAIR2 manually. If you are unsure, ask your Manager.

For additional support, the following resources are available:

Local CAIR Representatives (LCRs) (go.cdph.ca.gov/cair-lcr)

CAIR Help Desk:
Phone: 800-578-7889
Email: CAIRHelpdesk@cdph.ca.gov
CAIR2 Website: (cdph.ca.gov/cair)

Table of Contents

Section 1: Introduction 4
What is CAIR2? 4
User Responsibilities 4
Disclosure Process for Patients/Parents 5
Sharing Process for Patients/Parents 6
Information Request Process for Patients/Parents 7
Section 2: Accessing CAIR2 7
Section 3: Navigating in CAIR2 8
Section 4: Searching for Patients 9
Section 5: Viewing/Editing Patient Information in CAIR2 11
CAIR ID 12
Buttons 12
Personal Information 12
Additional Tabs (sections) 13
Patient AKA 13
Organization Information 13
Patient Information 15
Address Information 16
Responsible Persons 16
Patient Comments 18
Patient Notes 20
Section 6: Viewing Information in the History/Recommend Screen 20
Patient Information 22
Immunization History 22
Immunization Record 23
Vaccines Recommended by Selected Tracking Schedule 24
Section 7: Adding Historical Immunizations 25
Entering Single Historical Immunizations 25
Entering Historical Combination (Combo) Immunizations 26
Section 8: Reviewing Recommendations and Entering New Vaccines 28
Adding New Vaccines Using the Vaccines Recommended by Selected Tracking Schedule 28
Sites Using the CAIR2 Inventory Feature: 30
Sites Not Using the CAIR2 Inventory Feature: 32
Entering New Vaccines Using the Add New Imms Button 33

Section 9: Pop-Up Screens for Duplicate Immunizations Found 34
Pop-Up Screens for New Administered Immunizations 34
Pop-Up Screens for Historical Immunizations 36
Section 10: Editing/Deleting Vaccines 37
Editing/Deleting Administered Vaccines 37
Editing/Deleting Historical Vaccines 39
Noting a Subpotent Dose 39
Section 11: Documenting a Reaction to a Vaccine 40
Section 12: Viewing/Entering Tuberculosis (TB) Test History 41
Section 13: Entering a New Patient 42
Section 14: Running Patient Reports 44
Immunization History Report 46
Immunizations Needed/Routing Slip Report 47
Yellow Card Report 48
Section 15: Running the Doses Administered Report 50

Section 1: Introduction

What is CAIR2?

The **California Immunization Registry (CAIR2)** is a secure web-based system:

- Available to health care providers, including local health departments, community clinics, private medical offices, hospitals, pharmacies, long-term health care facilities, and other approved organizations such as schools, childcare facilities, and foster care agencies.
    - In addition to using CAIR2, schools and childcare facilities have access to information in CAIR2 via a separate California Department of Public Health (CDPH) system called the School and Childcare Roster Lookup (SCRL), specifically designed to assess school entry requirements.
- That helps providers/organizations track and update their patient/student/client immunization and tuberculosis (TB) records.
    - As of 01/01/2023, California law AB1797 requires that all immunizations given, including TB tests and race/ethnicity information, be reported to CAIR2. For more information, refer to the AB 1797 Immunization Registry FAQs page.
- Free of charge and managed by CDPH.

The goal of CAIR2 is to improve immunization services by providing a central location for healthcare providers and other approved organizations to store and access a person's complete immunization and TB test history. Providers/organizations using CAIR2 can view patient/student/client immunization histories and immunizations due, generate patient reports (e.g., Yellow Card, Blue Card) and practice-level reports, conduct reminder/recall activities, and manage their vaccine inventory. CAIR2 helps providers/organizations reduce missed opportunities, minimize the administration of duplicate immunizations, and increase immunization coverage rates.

User Responsibilities

Information stored in CAIR2 is confidential. Inappropriate use or disclosure of information may result in civil and criminal penalties per Federal and State laws and termination of your and/or your agency's rights to use CAIR2. As a CAIR2 user, you agree to read, understand, and abide by Section 120440 of the California Health and Safety Code and the following CAIR2 Confidentiality Policy:

- Use CAIR2 only for your assigned duties related to providing immunization-related services.
- Use CAIR2 only to find records for persons coming to your agency for services.
- Do not intentionally enter false/test data in CAIR2.
- Keep your CAIR2 user account and password confidential; do not share your account/password with anyone else. Employees needing access to CAIR2 are required to have their own account and a unique email address associated with their account.
- Log off from CAIR2 at the end of your shift or at any time when you leave your work area. Ensure other people cannot see the CAIR2 information on your computer screen.
- Keep the patient information you get from CAIR2 confidential. CAIR2 complies with federal HIPAA rules and California State law.

- Do not use your CAIR2 user account from a past job – ask your supervisor to transfer your account through the CAIR2 Account Update system.
- Understand that CAIR2 automatically tracks which patient/student/client records you open.

Disclosure Process for Patients/Parents

Before a patient's immunization record can be entered into CAIR2, the patient or parent/legal guardian must be disclosed about CAIR2. The full CAIR2 Disclosure and Sharing Policy is listed on the CAIR Disclosure/Sharing Policy page. Disclosure (giving the Registry Notice to the patient/parent) only needs to be done once. A patient is disclosed if they:

- Are given a copy of the CAIR2 Immunization Registry Notice to Patients and Parents (Registry Notice) to read or the opportunity to read a CAIR2 Registry Notice Poster that has been posted in the provider/agency waiting room and other visible areas.
- Have been given the opportunity to ask questions.
- Have been told that state law allows patient immunization information and TB test results to be shared with CAIR2, and they are allowed to decline to share their information in CAIR2 with other CAIR2 providers (i.e., have their record locked in CAIR2) and asked what their sharing preference is.

As a CAIR2 user, you must:

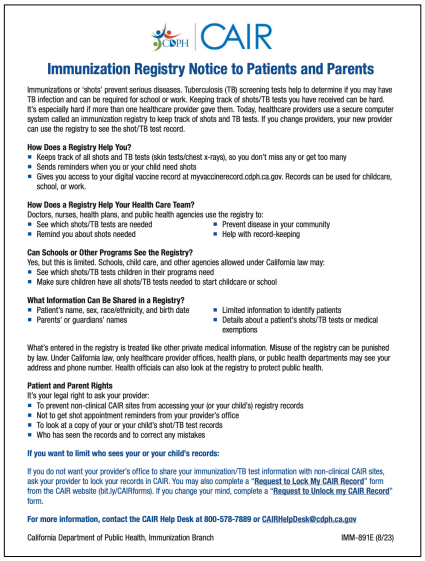
- Provide a copy of the CAIR2 Immunization Registry Notice to Patients and Parents (Registry Notice) to each patient whose information will be entered into CAIR2 to read. If the patient is under the age of 18, the Registry Notice must be given to the parent/legal guardian or directed to read the CAIR2 Registry Notice Poster (if your site uses the poster option described below).
- Provide the patient with a printed copy if the patient requests a hard copy to keep. The Registry Notice should be printed in the patient/parent's preferred language. Registry Notices in many languages are available on the CAIR Forms page.
- Make sure that the patient/parent understands the information in the Registry Notice and has the opportunity to ask questions.

CAIR2 Posters:

- As an alternative to giving each patient/parent a copy of the Registry Notice to read, your clinic/agency may post official Registry Notice posters in the office waiting and exam rooms, visible to all patients whose information may be entered into CAIR2.
- Both the English and Spanish versions of the poster must be posted. The posters must be posted in areas to maximize the opportunity for patients/parents to read the information.
- The clinic/agency must give a paper copy of the Registry Notice to the patient/parent to keep if requested. Registry Notice posters are available from your Local CAIR Representative (LCR).

Examples of the CAIR2 Registry Notice and Poster are below:

CAIR2 Registry Notice – 8.5” x 11”



CAIR

Immunization Registry Notice to Patients and Parents

Immunizations or ‘shots’ prevent serious diseases. Tuberculosis (TB) screening tests help to determine if you may have TB infection and can be required for school or work. Keeping track of shots/TB tests you have received can be hard. It’s especially hard if more than one healthcare provider gave them. Today, healthcare providers use a secure computer system called an immunization registry to keep track of shots and TB tests. If you change providers, your new provider can use the registry to see the shot/TB test record.

How Does a Registry Help You?
- Keeps track of all shots and TB tests (skin tests/chest x-rays), so you don’t miss any or get too many
- Sends reminders when you or your child need shots
- Gives you access to your digital vaccine record at myvaccinerecord.cdph.ca.gov. Records can be used for childcare, school, or work.

How Does a Registry Help Your Health Care Team?
Doctors, nurses, health plans, and public health agencies use the registry to:
- See which shots/TB tests are needed
- Remind you about shots needed
- Prevent disease in your community
- Help with record-keeping

Can Schools or Other Programs See the Registry?
Yes, but this is limited. Schools, child care, and other agencies allowed under California law may:
- See which shots/TB tests children in their programs need
- Make sure children have all shots/TB tests needed to start childcare or school

What Information Can Be Shared in a Registry?
- Patient’s name, sex, race/ethnicity, and birth date
- Parents’ or guardians’ names
- Limited information to identify patients
- Details about a patient’s shots/TB tests or medical exemptions

What’s entered in the registry is treated like other private medical information. Misuse of the registry can be punished by law. Under California law, only healthcare provider offices, health plans, or public health departments may see your address and phone number. Health officials can also look at the registry to protect public health.

Patient and Parent Rights
It’s your legal right to ask your provider:
- To prevent non-clinical CAIR sites from accessing your (or your child’s) registry records
- Not to get shot appointment reminders from your provider’s office
- To look at a copy of your or your child’s shot/TB test records
- Who has seen the records and to correct any mistakes

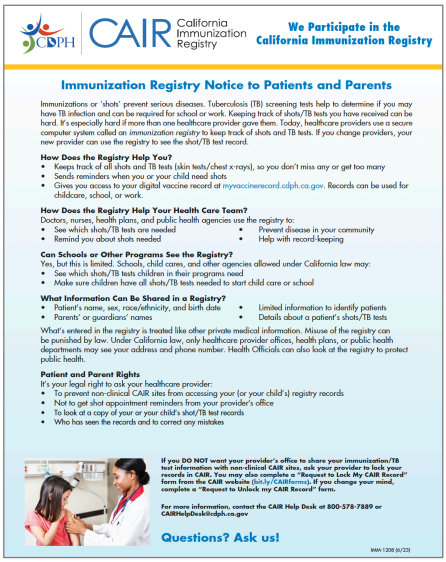
If you want to limit who sees your or your child’s records:

If you do not want your provider’s office to share your immunization/TB test information with non-clinical CAIR sites, ask your provider to lock your records in CAIR. You may also complete a “**Request to Lock My CAIR Record**” form from the CAIR website (bit.ly/CAIRforms). If you change your mind, complete a “**Request to Unlock my CAIR Record**” form.

For more information, contact the CAIR Help Desk at 800-578-7889 or CAIRHelpDesk@cdph.ca.gov

California Department of Public Health, Immunization Branch IMM-891E (8/23)

CAIR2 Registry Notice Poster – 18” x 24”



CAIR California Immunization Registry

We Participate in the California Immunization Registry

Immunization Registry Notice to Patients and Parents

Immunizations or ‘shots’ prevent serious diseases. Tuberculosis (TB) screening tests help to determine if you may have TB infection and can be required for school or work. Keeping track of shots/TB tests you have received can be hard. It’s especially hard if more than one healthcare provider gave them. Today, healthcare providers use a secure computer system called an *immunization registry* to keep track of shots and TB tests. If you change providers, your new provider can use the registry to see the shot/TB test record.

How Does the Registry Help You?
- Keeps track of all shots and TB tests (skin tests/chest x-rays), so you don’t miss any or get too many
- Sends reminders when you or your child need shots
- Gives you access to your digital vaccine record at myvaccinerecord.cdph.ca.gov. Records can be used for childcare, school, or work.

How Does the Registry Help Your Health Care Team?
Doctors, nurses, health plans, and public health agencies use the registry to:
- See which shots/TB tests are needed
- Remind you about shots needed
- Prevent disease in your community
- Help with record-keeping

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Yes, but this is limited. Schools, child cares, and other agencies allowed under California law may:
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- Limited information to identify patients
- Details about a patient’s shots/TB tests

What’s entered in the registry is treated like other private medical information. Misuse of the registry can be punished by law. Under California law, only healthcare provider offices, health plans, or public health departments may see your address and phone number. Health officials can also look at the registry to protect public health.

Patient and Parent Rights
It’s your legal right to ask your healthcare provider:
- To prevent non-clinical CAIR sites from accessing your (or your child’s) registry records
- Not to get shot appointment reminders from your provider’s office
- To look at a copy of your or your child’s shot/TB test records
- Who has seen the records and to correct any mistakes

If you DO NOT want your provider’s office to share your immunization/TB test information with non-clinical CAIR sites, ask your provider to lock your records in CAIR. You may also complete a “Request to Lock My CAIR Record” form from the CAIR website (bit.ly/CAIRforms). If you change your mind, complete a “Request to Unlock my CAIR Record” form.

For more information, contact the CAIR Help Desk at 800-578-7889 or CAIRHelpDesk@cdph.ca.gov

Questions? Ask us!

IMM-1308 (6/23)

Sharing Process for Patients/Parents

A patient/parent has the right to decline to share their/their child’s information in CAIR2 with other CAIR2 providers. In this case, the patient’s information should still be entered into CAIR2, but the record **must be locked**.

- Locked records are only automatically viewable by users at the site that locked the record. Sites that do not own the locked record will receive a pop-up message indicating that they should only open the record if they are providing the patient with immunizations or other medical care.
- A patient’s Sharing Status is documented in CAIR2 when the patient’s record is first created and defaults to Share (unlocked) unless the setting is changed to ‘No’ in the dropdown field. The sharing status must be updated and noted in CAIR2 any time the patient/parent changes their decision.
- CAIR2 clinical users (Regular or Inventory [Power]) can lock/unlock the patient’s record in CAIR2 directly by logging into CAIR2 and updating the Share fields on the patient’s Update Patient screen (see the Patient Information section).
- Changes to a patient’s Share/Decline to Share status can also be submitted to CAIR2 by sites participating in CAIR2 Data Exchange via their electronic submissions to CAIR2.

Note: The patient/parent does not need to complete a form to change their/their child’s Sharing Status if the request is made in person. No phone/email requests to change sharing status are allowed. If your clinic/agency is unable to document/update a patient’s Sharing Status in CAIR2 via the methods listed above, have the patient/parent go to the CAIR Forms page and complete an online request form to have the CAIR Help Desk lock or unlock their/their child’s record.

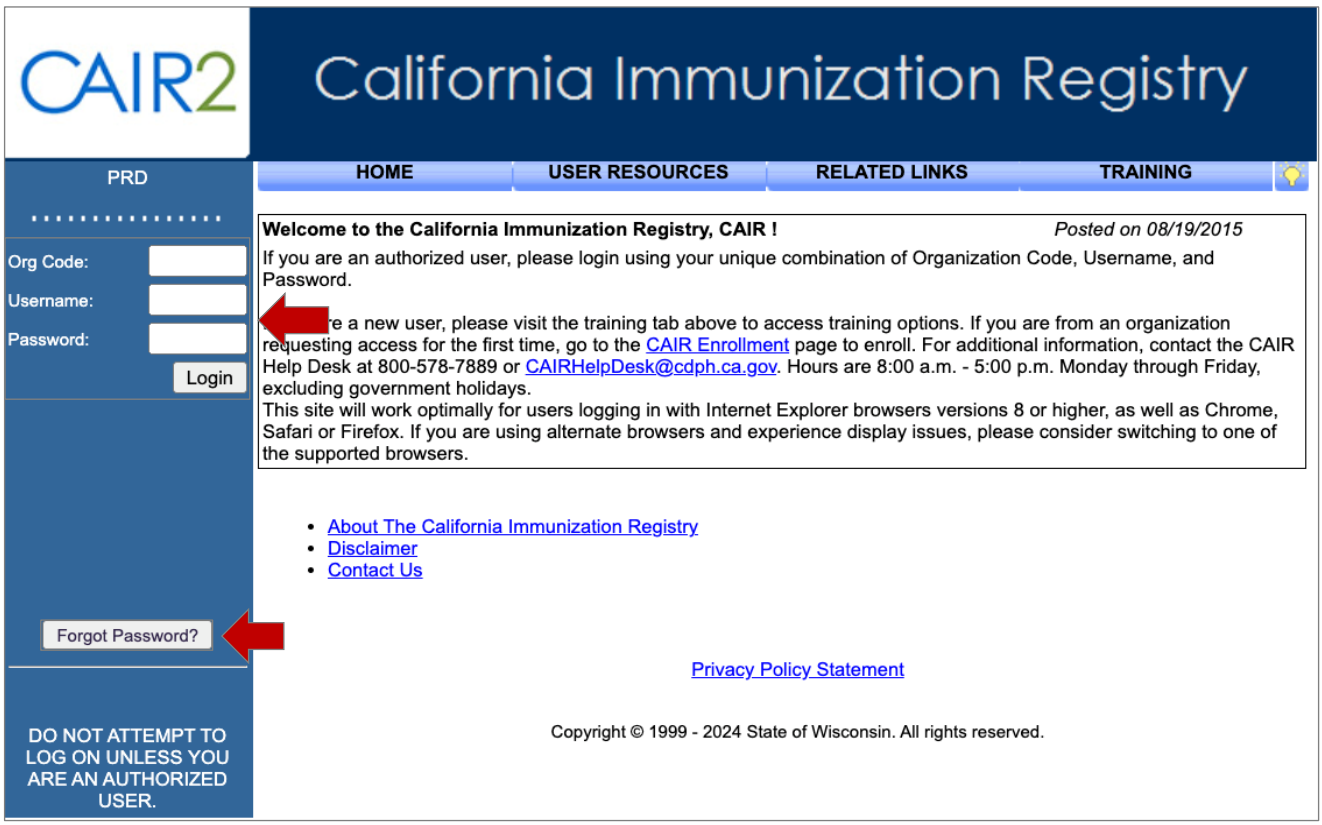
Information Request Process for Patients/Parents

As described in the CAIR2 Registry Notice, patients/parents have the right to request a copy of their/their child's CAIR2 record via the Digital Vaccine Record (DVR) portal and can request to have errors corrected via the DVR Virtual Assistant. Patients/parents also have the right to receive a list of all providers/agencies that have viewed their/their child's CAIR2 record by contacting the CAIR Help Desk: CAIRHelpdesk@cdph.ca.gov; 800-578-7889 to obtain this information.

Section 2: Accessing CAIR2

To access CAIR2:

1. Go to the CAIR2 Login screen (cair.cdph.ca.gov).
2. Enter your CAIR2 Org Code, Username, and Password, and click the **Login** button.
   Note: Only the 'Password' field is case-sensitive.



Additional Login/Account Information:

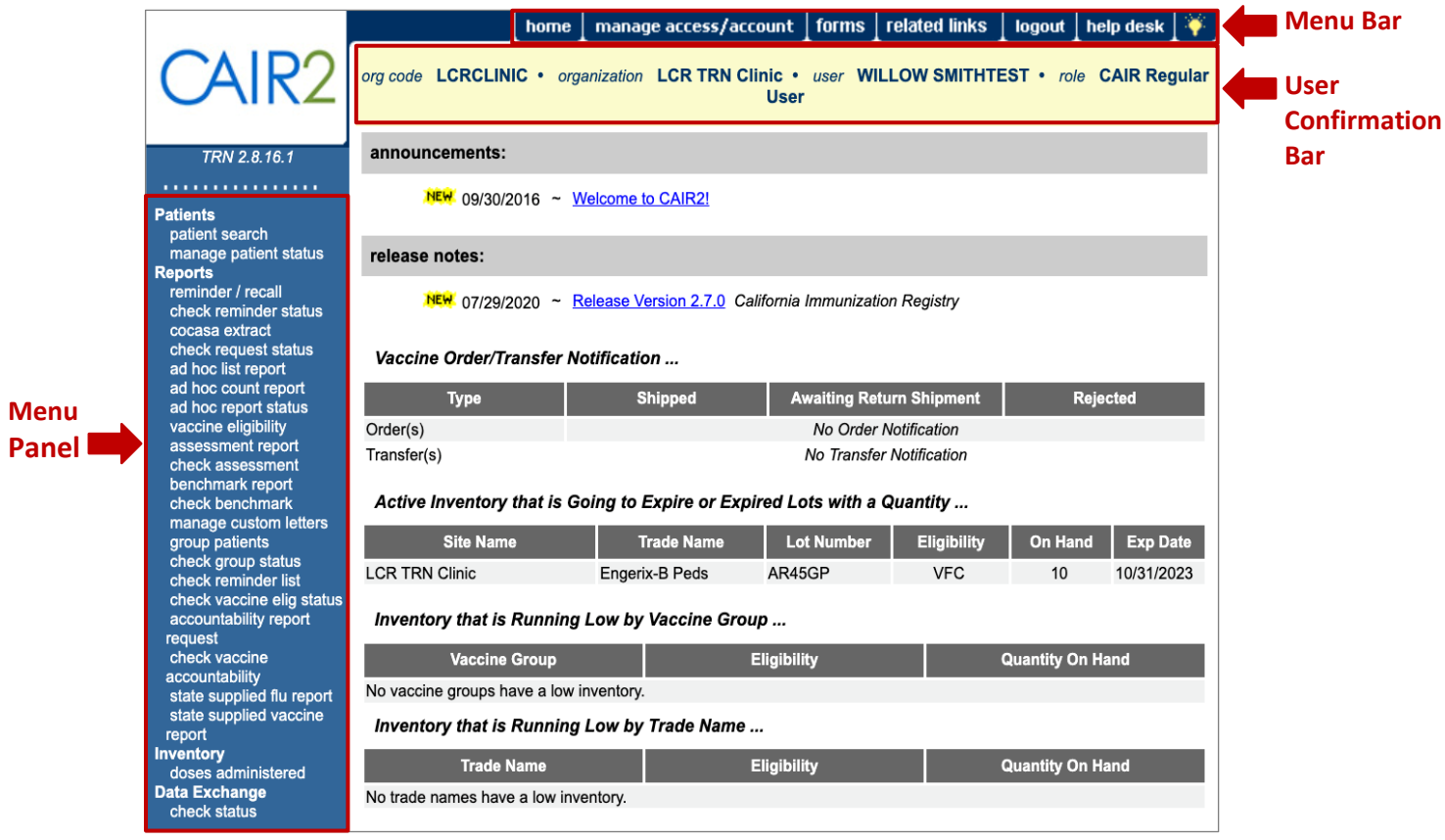
- The first time you log into CAIR2, you will be asked to read and agree to the Security Notification, change your Password, and enter answers to Security Questions.
  Note: The 'Forgot Password?' button will not work the first time you are logging into CAIR2. If you have issues logging in the first time, contact the CAIR Help Desk. LCRs cannot help users with password issues. Only the CAIR Help Desk has that ability.
- If your email address has not been entered, you will be prompted to enter it. The email address must be unique to you (i.e., it cannot be shared with other staff at your site).

- If you forget your password or are locked out, click the **Forgot Password?** button (see screenshot above) on the Login screen and answer security questions to reset your password.
- Passwords must be changed every 90 days; the system will prompt you to change your password.
- You will be automatically logged out after 30 minutes of inactivity.
- Your user account will be automatically inactivated after 90 days of inactivity; your supervisor must then request to re-activate your account by contacting the CAIR Help Desk.
- For additional information, refer to the **CAIR2 Login and Account Management Guide** found on the CAIR2 User Guides Page.

Section 3: Navigating in CAIR2

Once you log into CAIR2, the 'Home Screen' will display. It contains Announcements (new information about CAIR2) and Release Notes (information about bug fixes and enhancements to CAIR2). If your site uses the CAIR2 Inventory feature, the 'Home Screen' will list vaccine lots that your site's Inventory (Power) user(s) has entered into CAIR2 that have expired, are due to expire soon, or are running low on doses remaining. Your site's Inventory (Power) user(s) manage these alerts' settings.

Home Screen



On every page in CAIR2, the following information/navigation sections will display:

- **Menu Bar:** This section is located at the top of the screen. It contains the following options:
  - **Home:** Returns you to the CAIR2 'Home Screen' from anywhere within the CAIR2 system.

- **Manage Access/Account:** Allows you to update your user account information (e.g., contact information, password, and security questions), and you can log into a different Org Code that you have access to.
- **Forms:** Hyperlinks for printing blank forms and supporting documentation.
- **Related Links:** Hyperlinks to other immunization-related websites and directories.
- **Logout:** Logs you out of CAIR2.
- **Help Desk:** Displays contact information for the CAIR Help Desk.
- **'Light Bulb' Icon:** Displays information/help about what is located on that specific screen or feature you selected within the CAIR2 system.

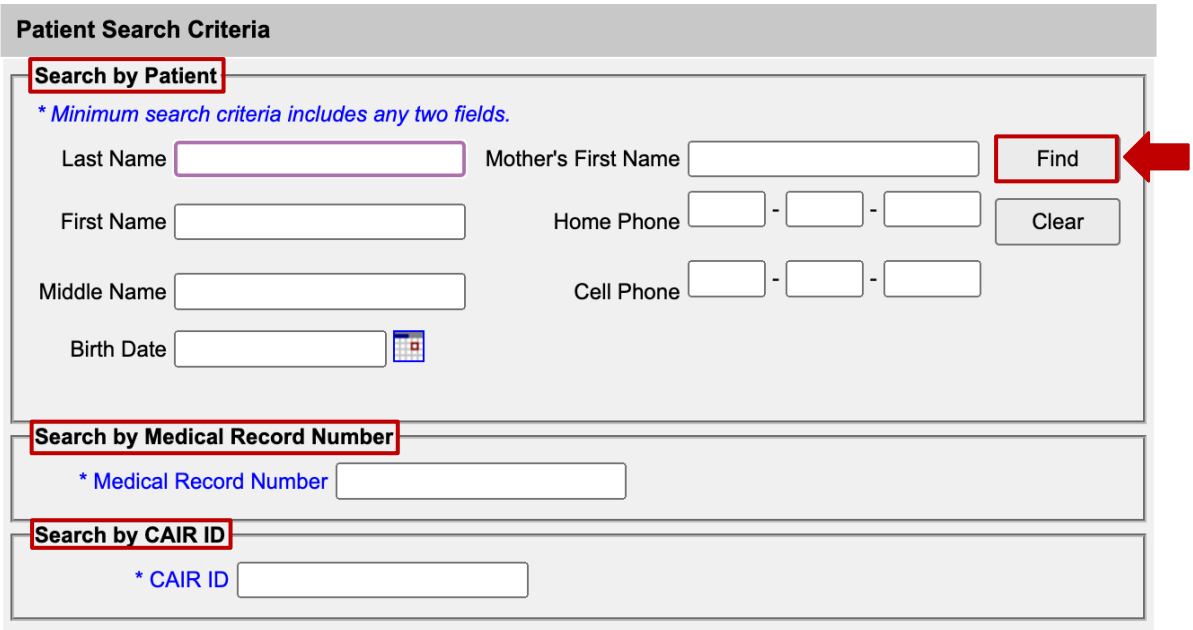
- **User Confirmation Bar:** This section is directly beneath the 'Menu Bar' and is highlighted in yellow. It displays your clinic/agency's Org Code, your clinic/agency's Name, your First and Last Name, and your User Role (access level).
- **Menu Panel:** This section appears in blue on the left side of the screen. It contains links to the CAIR2 features applicable to your CAIR2 user role.

Section 4: Searching for Patients

To search for a patient in CAIR2:

1. Click the **patient search** link underneath the 'Patients' header in the left blue menu panel.

The 'Patient Search Criteria' screen will display.



2. Search for the patient **at least three times** by entering **two pieces** of information each time in the 'Search by Patient' section. We recommend:
   - Last Name and First Name

- Last Name and Birth Date
- First Name and Birth Date

A wildcard search can also be used in the name fields – enter at least the first 3 letters of the last name and/or at least the first 2 letters of the first name with a second field (e.g., Birth Date). This is good for finding patients with unique and hard-to-spell names.

Note: When searching using first and/or last names, CAIR2 ignores spaces, apostrophes, and hyphens.

You can also search using one of the following fields. **Note:** These two options will only work if you enter an exact match.

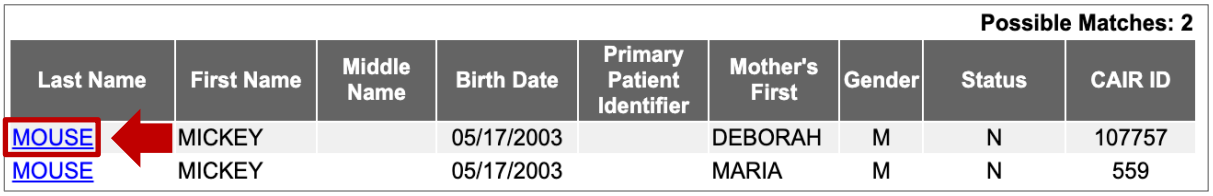
- **Medical Record Number (MRN):** The patient's MRN associated with your clinic/agency.
- **CAIR ID:** The patient's unique CAIR2 ID number if you have it.

3. Click the **Find** button. Results that match your search criteria will display at the bottom of the screen.

   Note: If too many possible matches are returned, the message "xxxx patients were found. Please refine your search criteria to limit your patient list" will display. Narrow down your search by adding more information in the search fields, and then click the **Find** button to search again.

4. Look closely at all of the information that displays to find the correct patient.

5. Click on the hyperlink of the patient's **Last Name** to view the patient's record. **Note:** If the mother's name is known and listed in the record, the 'Mother's First' column can also be used to identify the correct patient record.



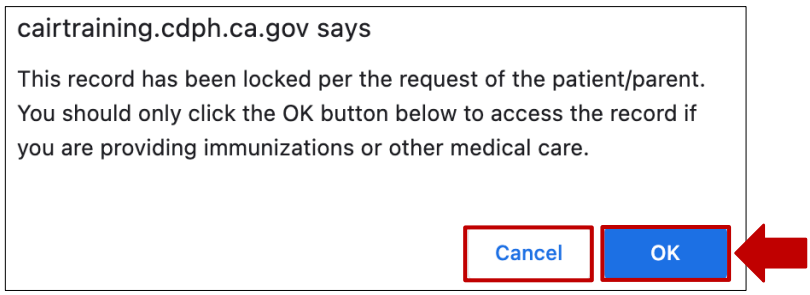
Possible Matches: 2

Last Name	First Name	Middle Name	Birth Date	Primary Patient Identifier	Mother's First	Gender	Status	CAIR ID
MOUSE	MICKEY		05/17/2003		DEBORAH	M	N	107757
MOUSE	MICKEY		05/17/2003		MARIA	M	N	559

Note: After clicking the patient's 'Last Name' to open their record, a pop-up message may display before you can view the record. Below is further information on the two different types of pop-ups that may display.

Locked Record Pop-Up:

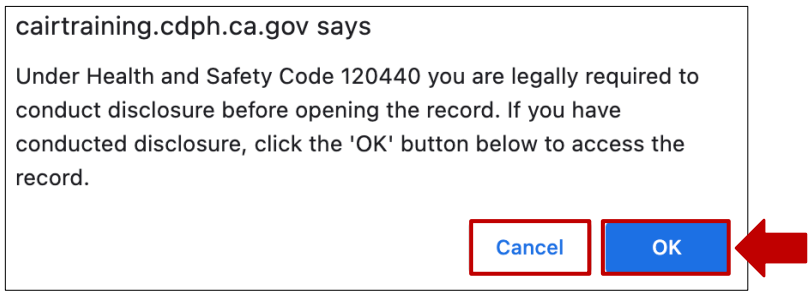
- The pop-up message below will appear if a patient's CAIR2 record is **locked**. If you are providing vaccines or other medical care to the patient, you can click the **OK** button to open their record. If not, you must click the **Cancel** button, and the record will remain locked. If the patient/parent/legal guardian is **not** physically present, they can submit a request directly to CAIR2 to unlock their record on the CAIR Forms page.



Non-Disclosed Record Pop-Up:

- The pop-up message below will appear if a patient has **not been disclosed**. If you are providing vaccines or other medical care to the patient, you are legally required to disclose the patient or parent/legal guardian (i.e., if the patient is under the age of 18) by following the information in the Disclosure Process for Patients/Parents section before accessing their record.

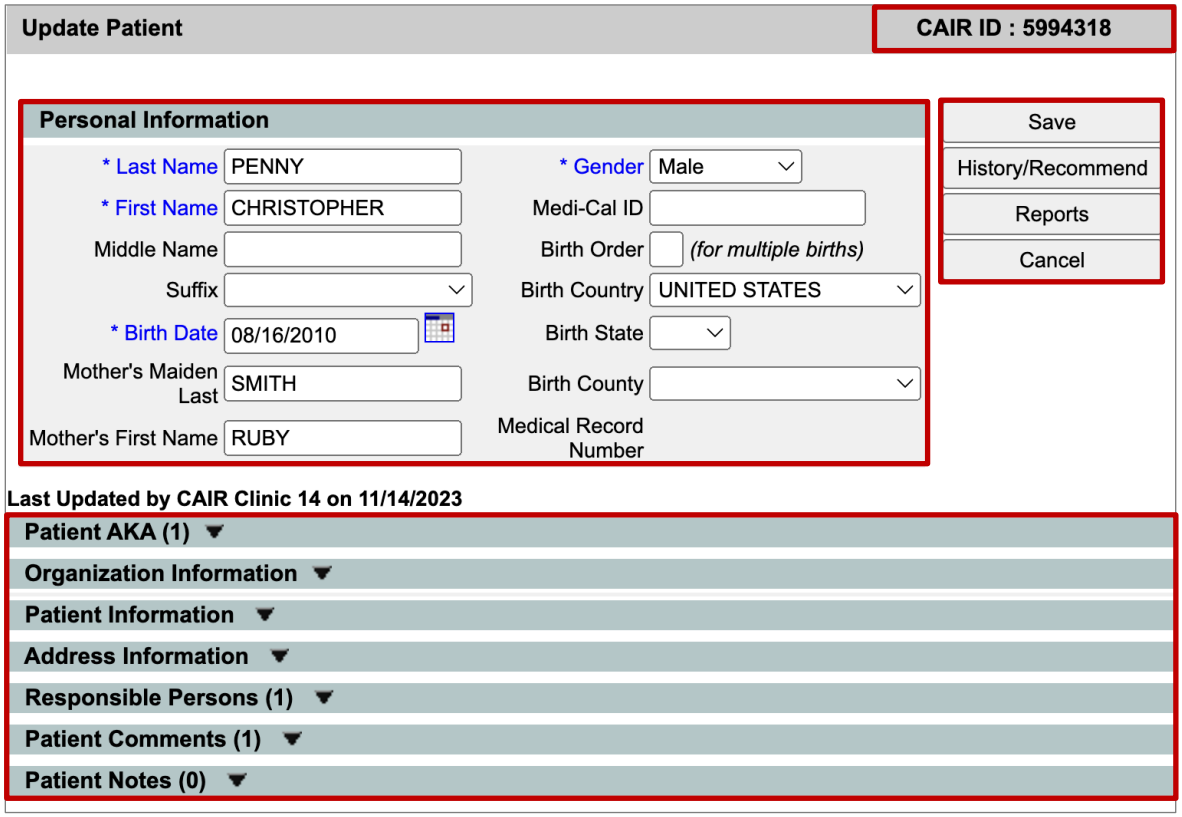
  Once you have disclosed the patient/parent/legal guardian, you can click the **OK** button to open the patient's record. If the patient/parent/legal guardian isn't present or cannot be disclosed, the **record should not be opened**, and you must click the **Cancel** button.



Section 5: Viewing/Editing Patient Information in CAIR2

Once you open a patient's record, the 'Update Patient' screen will display. Here, you can view and update patient demographics, contact information, and other information.

Note: It is important **to verify you've opened the correct patient's record** before making any changes.



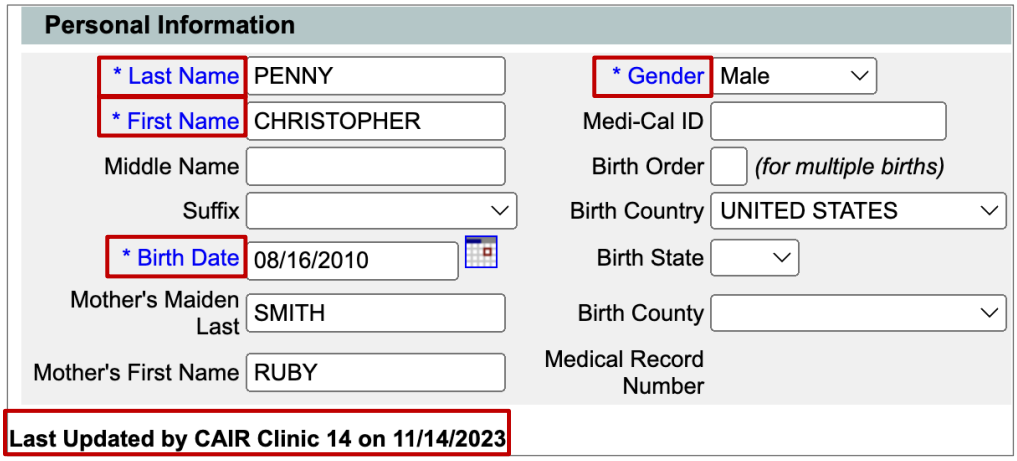
Note: You can make changes or add information in each section (tab) for fields that are **not** greyed out.

CAIR ID: The patient's unique CAIR2 ID number is in the top right corner of the 'Update Patient' screen. It is greyed out and cannot be changed.

Buttons: There are four buttons at the top right corner of the 'Update Patient' screen, which allows you to save the information you have added/changed on this screen and navigate to other screens in CAIR2. The buttons are:

- **Save:** After you add or update information in any section of the 'Update Patient' screen, always click the **Save** button. A red "Patient record successfully saved" message will display at the top of the screen to indicate that your changes have been saved.
- **History/Recommend:** This button takes you to the 'History/Recommend' screen, where you can view the patient's immunization history and immunization recommendations (see the Viewing Information in the History/Recommend Screen section).
- **Reports:** Allows you to print Patient Reports (see the Running Patient Reports section).
- **Cancel:** This takes you back to the 'Patient Search Criteria' screen, where you can search for another patient.

Personal Information: This section allows you to view and update the patient's basic demographic information. Required fields are in blue font and are marked with an asterisk (*) next to them. The required fields are Last Name, First Name, Birth Date, and Gender.



Note: The row below the 'Mother's First Name' field tells you which clinic/agency last updated the patient's record and the date of when it was updated.

Adding additional identifiers helps prevent the creation of duplicate records and assists with differentiating between patients with similar information. These fields are not required, but they are important, so if you have this information, it should be entered in the patient's record. These include:

- **Middle Name and Suffix**
- **Mother's Maiden Last Name:** If you don't know the maiden last name, leave it blank.
- **Mother's First Name:** This is only required if the patient is under 18, but it is highly recommended that it be included as it provides a unique identifier.

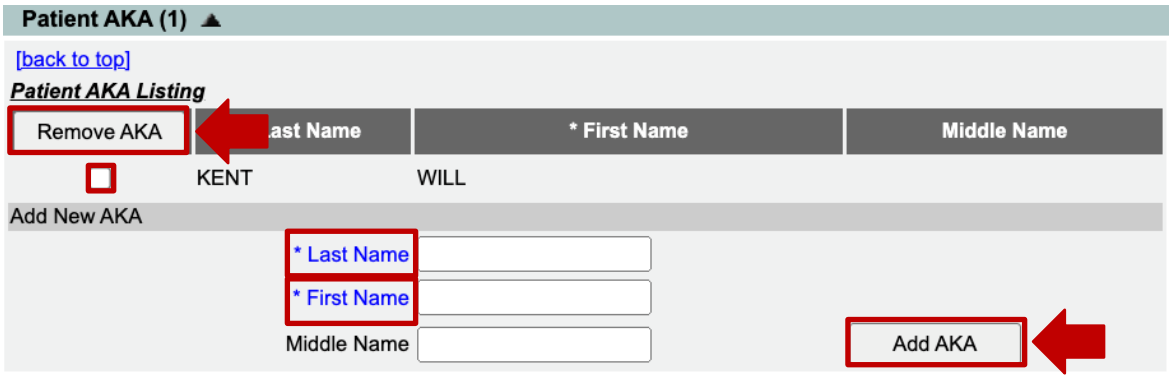
- **Medical Record Number (MRN):** If your site has an internal MRN for the patient and has entered it into CAIR2, it will display here and be greyed out (see the Organization Information section on entering an MRN).

Other optional fields include:

- **Medi-Cal ID, Birth Country, Birth State, and Birth County**
- **Birth Order:** This field indicates if the patient is part of a multiple birth (such as twins, triplets, etc.). Leave this blank if the patient is a single birth (i.e., not a twin, triplet, etc.).

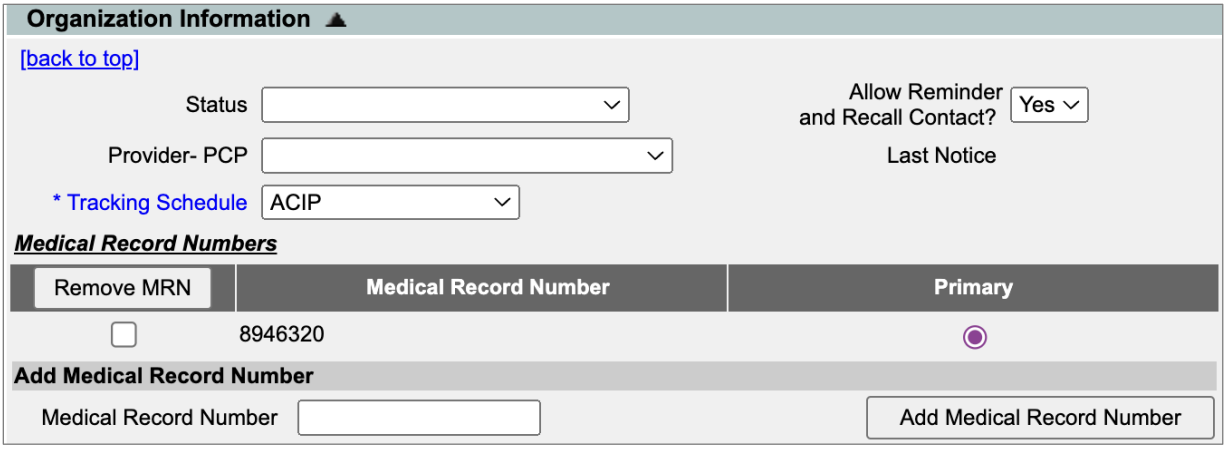
Additional Tabs (sections): The 'Update Patient' screen contains seven additional tabs (sections). Each is described below. To access each tab, click the arrow ▼ for the tab you want to open. Once finished, you can collapse that tab by clicking the arrow ▲ again. If you make changes in a section, remember to click the **Save** button before moving to the next section to ensure your changes are saved.

Patient AKA: This section allows you to add, remove, or update a patient's AKA (i.e., 'Also Known As' name). The AKA can be used to search for a patient by an alternate name, such as a nickname or recently changed name, and will also display in the search results. More than one AKA can be added for a patient.

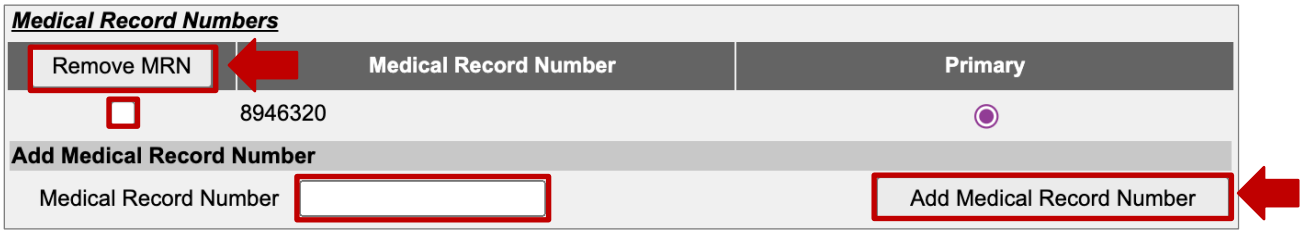


- **To add an AKA:** Enter the patient's AKA in the 'Last Name' and 'First Name' fields (required), then click the **Add AKA** button. Click the **Save** button at the top of the screen.
- **To remove an AKA:** Click the checkbox under the 'Remove AKA' button next to the name that you want to remove, then click the **Remove AKA** button. Click the **Save** button at the top of the screen.

Organization Information: This section allows you to add or change information about the patient that pertains to your specific clinic/agency. Some fields can impact whether the patient displays in some of your site's CAIR2 reports.



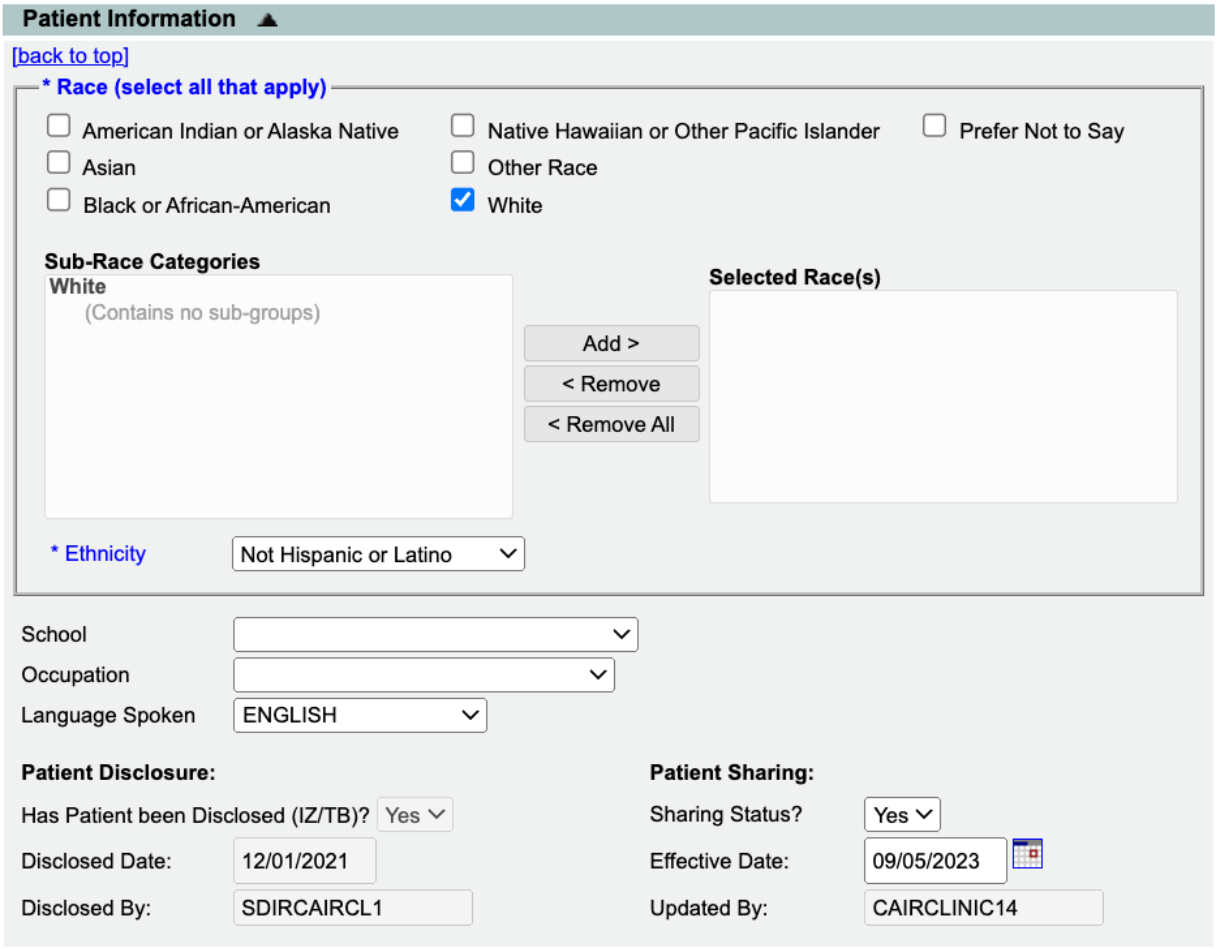
- **Status:** Patients set as 'Active' will display in your site's CAIR2 reports. If this is set to 'Inactive', the patient will not be included in some reports. It is important to inactivate patients who no longer come to your site for services to ensure your reports are accurate. More information on inactivating groups of patients at the same time instead of individually can be found in the **CAIR2 Guide to Using Manage Patient Status** on the CAIR2 User Guides Page.
- **Provider-PCP:** We are not using this field at this time – this field is blank.
- **Tracking Schedule:** The tracking schedule determines the vaccine recommendations you see in CAIR2 for the patient. This field defaults to the Advisory Committee of Immunization Practices (ACIP) recommended schedule, but you can choose another schedule in the dropdown menu.
- **Allow Reminder and Recall Contact?:** This field defaults to 'Yes'. However, choosing 'No' will remove the patient from your site's Reminder/Recall reports if the patient/parent has stated they do not want to receive Reminder/Recall notices.
- **Last Notice:** A date will appear here if the patient was included in a Reminder/Recall report generated by your site. The date indicates the date of the Reminder/Recall report.
- **Medical Record Numbers:** Allows you to add or remove a Medical Record Number (MRN) if your site has an MRN for the patient. The MRN is only viewable and searchable by users at your site.



  - **To add an MRN:** Enter the information in the 'Medical Record Number' field and click the **Add Medical Record Number** button. Click the **Save** button at the top of the screen.
  - **To delete an MRN:** Click the checkbox to the left of the 'Medical Record Number' you want to remove, then click the **Remove MRN** button. Click the **Save** button at the top of the screen.

Note: You can designate one MRN as the 'Primary'. This MRN will display in the 'Personal Information' section at the top of the screen. To do this, click the radio button under the 'Primary' column next to the MRN you want to designate. Click the **Save** button at the top of the screen.

Patient Information: This section allows you to view, add, or update information about your patient that is not included in the 'Personal Information' section. Some of the information in this section can impact whether other sites using CAIR2 can view the patient's record.



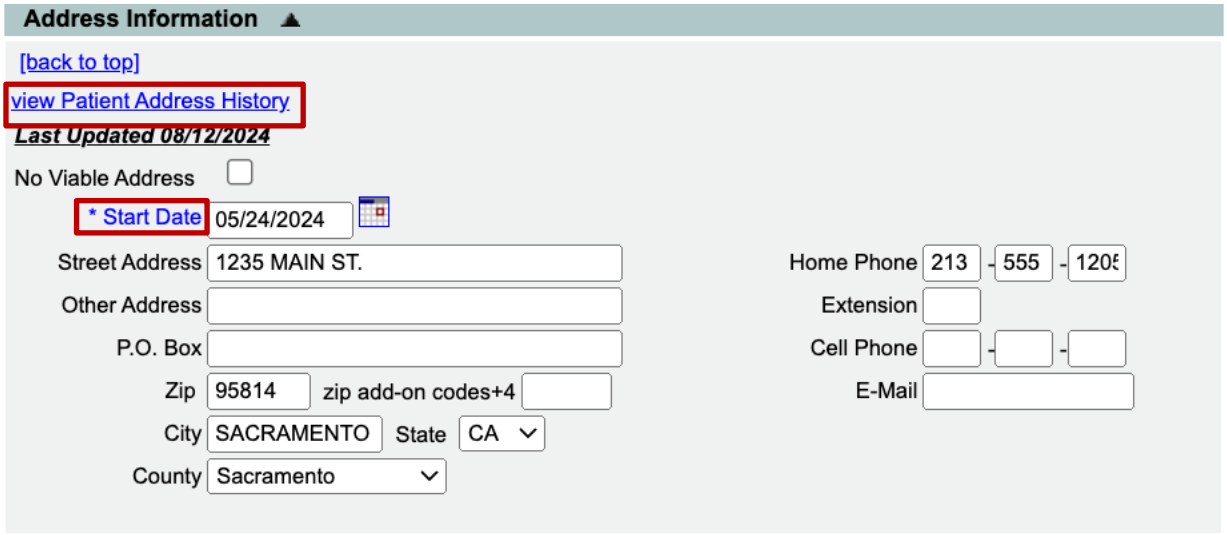
- **Race and Sub-Race Categories:** Enter information about the patient's Race (required) and Sub-Race (optional). If the patient prefers not to disclose this information, select the **Prefer Not to Say** option. **Note:** The 'Sub-Race Categories' section only displays categories if 'Asian' or 'Native Hawaiian or Other Pacific Islander' are selected.
- **Ethnicity:** Enter information about the patient's Ethnicity (required). If the patient prefers not to disclose this information, select the **Prefer Not to Say** option.
- **School and Occupation:** We are not using these fields at this time – leave them blank.
- **Language Spoken:** This field indicates the language in which the patient's Reminder/Recall reports will be printed. There are only two options: English and Spanish, and the default is English.
- **Patient Disclosure:** This shows the date and clinic/agency that conducted the CAIR2 disclosure with the patient. Once documented, these fields are greyed out and cannot be changed.
- **Patient Sharing:** This tells you whether the patient/parent is allowing the sharing of their/their child's CAIR2 record with other clinics/agencies using CAIR2. The patient/parent can request to have their sharing status changed at any time.
    - If the 'Sharing Status' is set to 'Yes', the record is unlocked and viewable by other clinics/agencies using CAIR2.

- If the ‘Sharing Status’ is set to ‘No’, the record is locked, and only users at the clinic/agency that locked the record can view it automatically. Users at other sites will receive a pop-up message with additional instructions to verify if they are temporarily allowed to open the record.

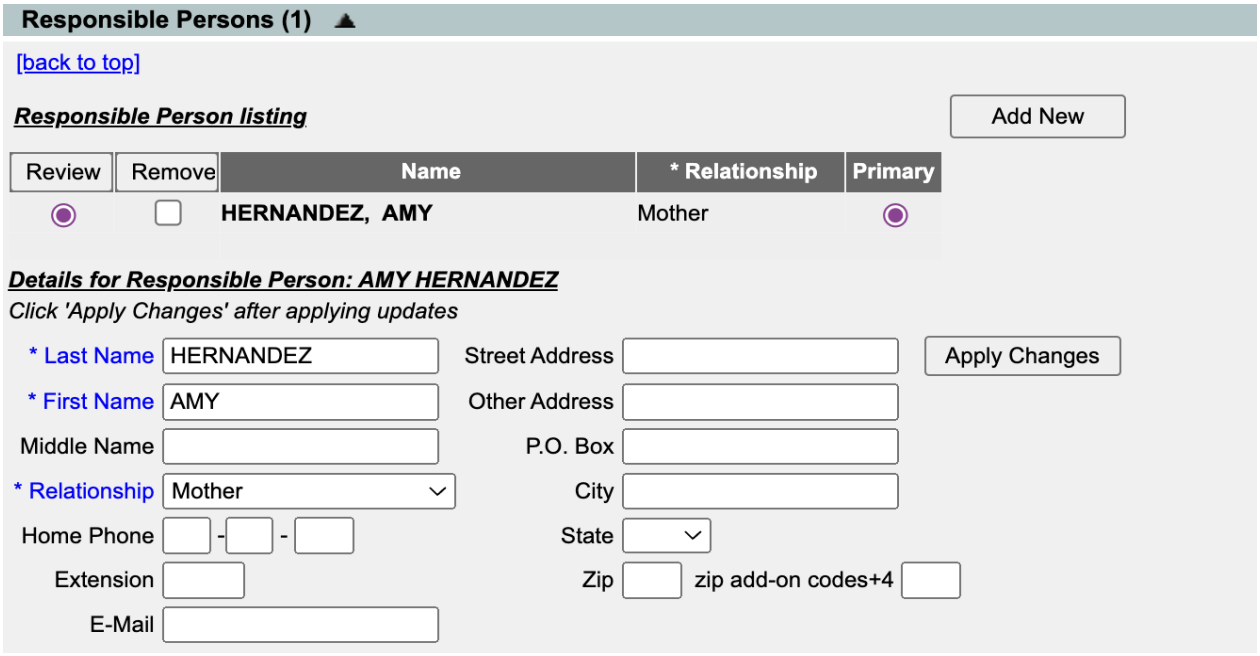
Note: For more information, see the Disclosure Process for Patients/Parents section and the Sharing Process for Patients/Parents section.

Address Information: This section lets you view, add, and update the patient's address and other contact information. This information also helps distinguish between patients with similar names and dates of birth. Adding Phone and Email information is very helpful for Reminder/Recall efforts, and adding the patient’s ‘Cell Phone’ and/or ‘E-Mail’ will allow the patient to request a digital copy of their vaccine record via the Digital Vaccine Record (DVR) portal.

Note: You must add a new ‘Start Date’ before updating the address. This ensures the old address is also retained in CAIR2 to help distinguish between patients. Click on the **view Patient Address History** link to see previous addresses recorded for the patient.

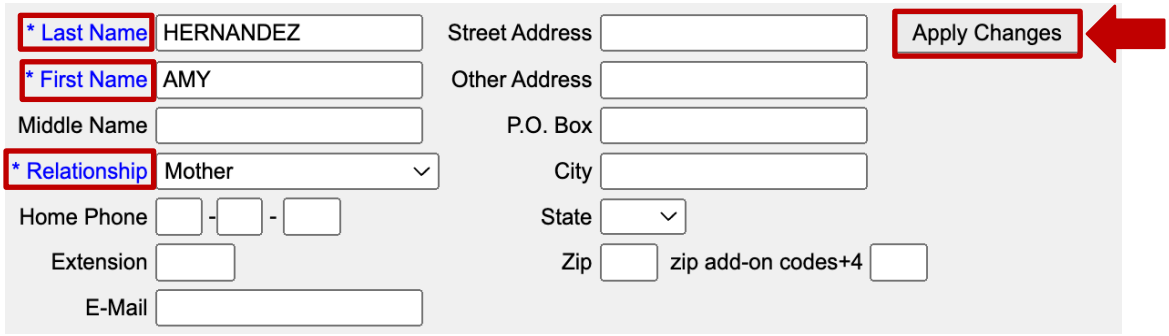


Responsible Persons: This section (see screenshot below) allows you to add, update, and remove multiple responsible persons for your patient in CAIR2 (e.g., parents, legal guardians, etc.).

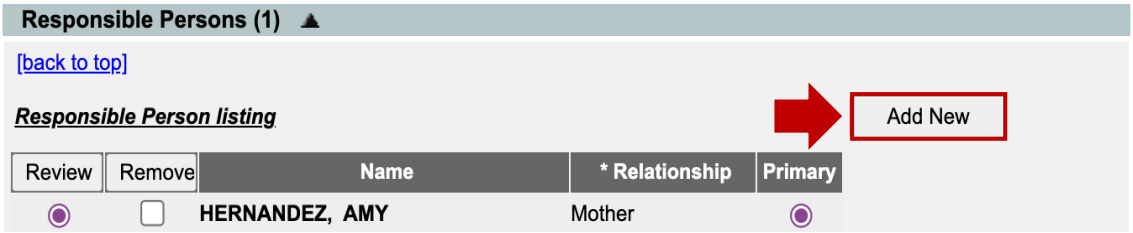


To add a Responsible Person:

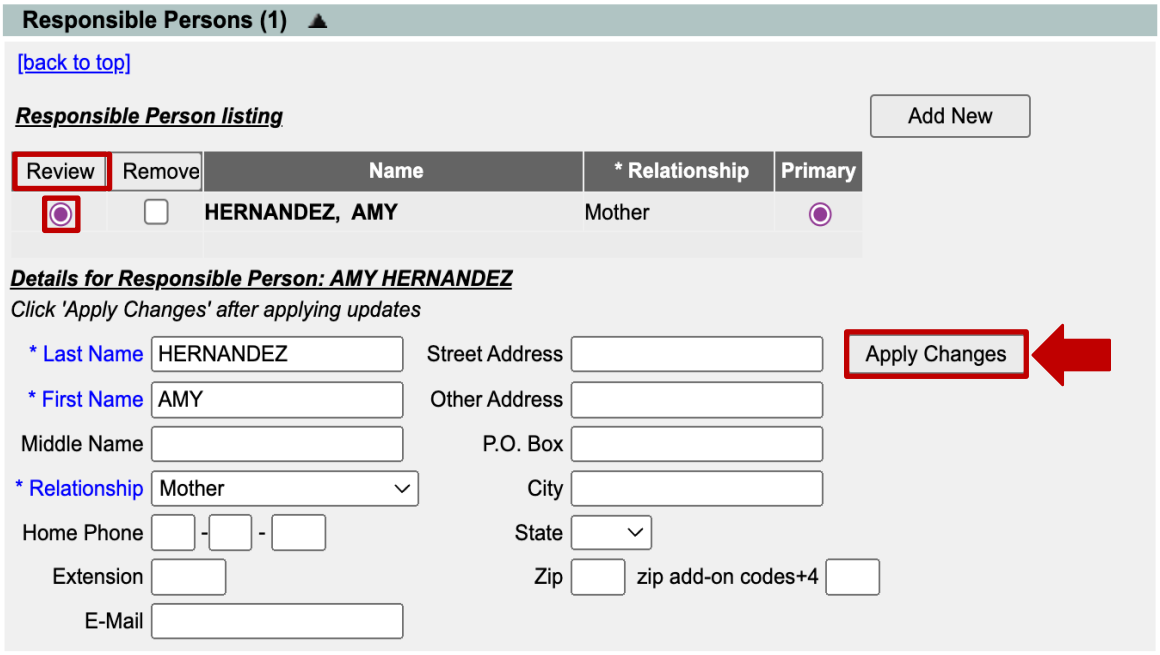
- If a Responsible Person(s) is **not yet** listed, enter at minimum the three required fields 'Last Name', 'First Name', 'Relationship', and any other information you have. Then click the **Apply Changes** button, and their information will be listed under the 'Responsible Person listing'. Click the **Save** button at the top of the screen.



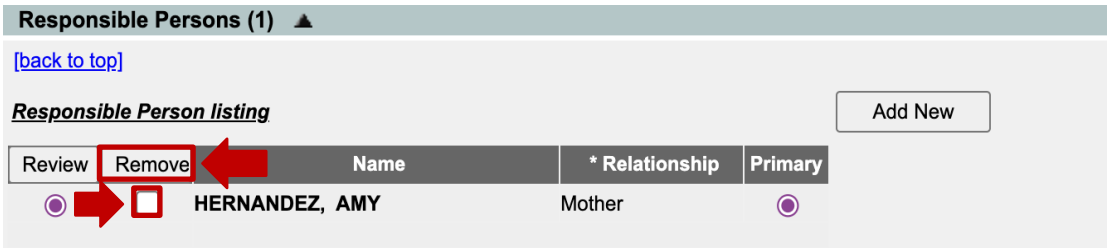
- If a Responsible Person(s) is **already** listed, click the **Add New** button to add another one, and then follow the steps mentioned above.



- **To update an existing Responsible Person's information:** Under the 'Responsible Person listing', locate the Responsible Person you would like to make changes to and click on the radio button under the 'Review' button next to their name (see screenshot below). Then click the **Review** button. Their information will display for you to update. Click the **Apply Changes** button when you are done. Click the **Save** button at the top of the screen.



- **To remove a Responsible Person:** Under the 'Responsible Person listing', locate the Responsible Person you would like to remove and click on the check box under the 'Remove' button next to their name. Then click the **Remove** button. Click the **Save** button at the top of the screen.



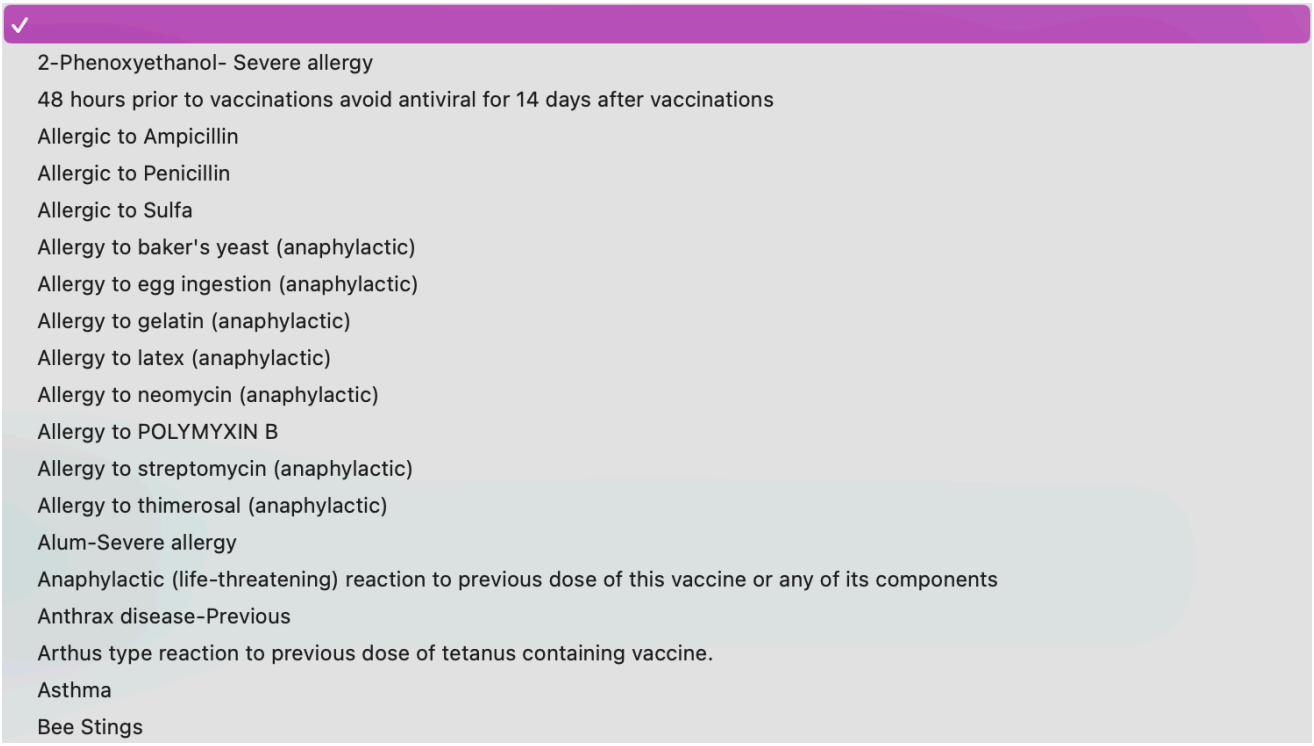
Note: You can designate one Responsible Person as the 'Primary'. This person's information will display when you open this tab. To do this, click the radio button under the 'Primary' column next to the person you want to designate. Click the **Save** button at the top of the screen.

Patient Comments: This section allows you to view, add, and delete medical information about the patient that could impact future vaccination recommendations.

Comments can be selected from the dropdown list (ordered alphabetically) and include anaphylactic reactions, chronic diseases, underlying medical conditions, titer test results noting immunity, history of the disease, and patient refusals/deferrals of immunization (see example of the first half of the list below).

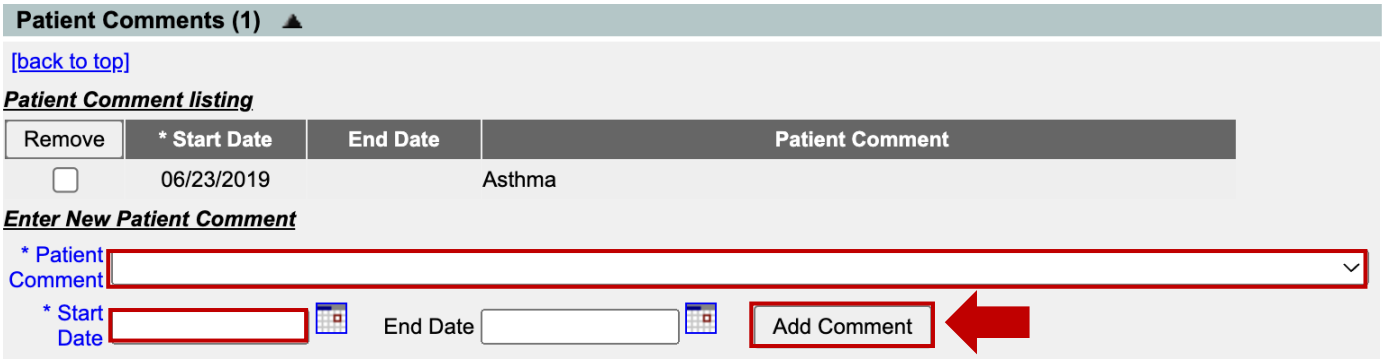
Note: Some Comments impact the patient's future vaccination recommendations, and some do not (see the Vaccines Recommended by Selected Tracking Schedule section).

Below is a partial list of Patient Comments available for selection:



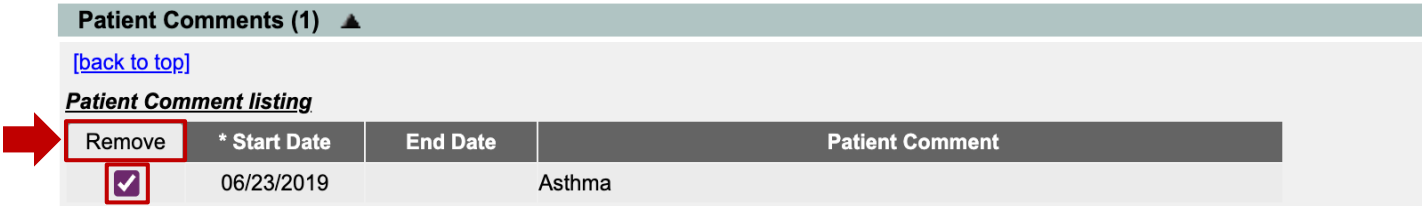
Any existing comments will display under the 'Patient Comment listing' section.

To add a new Patient Comment:



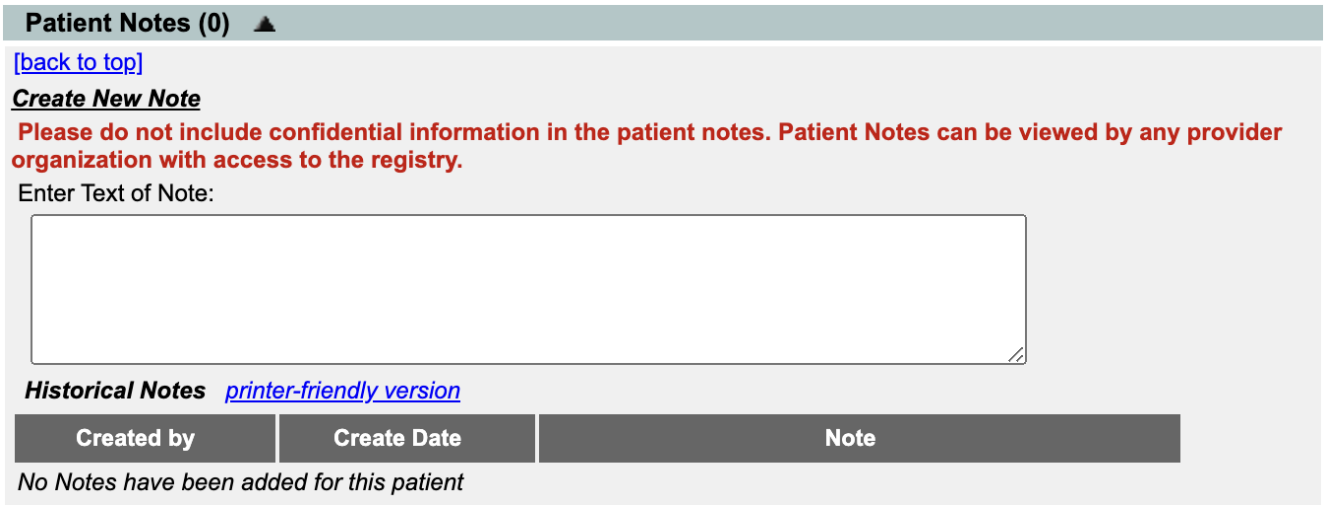
1. Select the Comment to be added from the **Patient Comment** dropdown list. **Note:** Only medically diagnosed and documented conditions should be added.
2. Enter a **Start Date** (required). An 'End Date' is not required, and some Comments do not allow an end date to be entered. **Note:** End Dates have no impact on future vaccination recommendations.
3. Click the **Add Comment** button.
4. Click the **Save** button at the top of the screen to save your entry.
5. After you've saved the Patient Comment, check to see if the vaccine recommendations have been impacted by clicking on the **History/Recommend** button at the top of the screen and view the 'Vaccines Recommended by Selected Tracking Schedule' (see the Vaccines Recommended by Selected Tracking Schedule section). Remember that not all Patient Comments impact vaccine recommendations.

To Remove a Patient Comment: Check the box next to the Comment you want to remove under the 'Patient Comment listing' and click the **Remove** button. Then, click the **Save** button at the top of the screen.



Patient Notes: This section is a free-text field where you can include additional information that is important when providing immunizations to the patient (e.g., The patient is afraid of needles). Patient Notes are viewable by all other CAIR2 users. Once you have entered the note, click the **Save** button at the top of the screen.

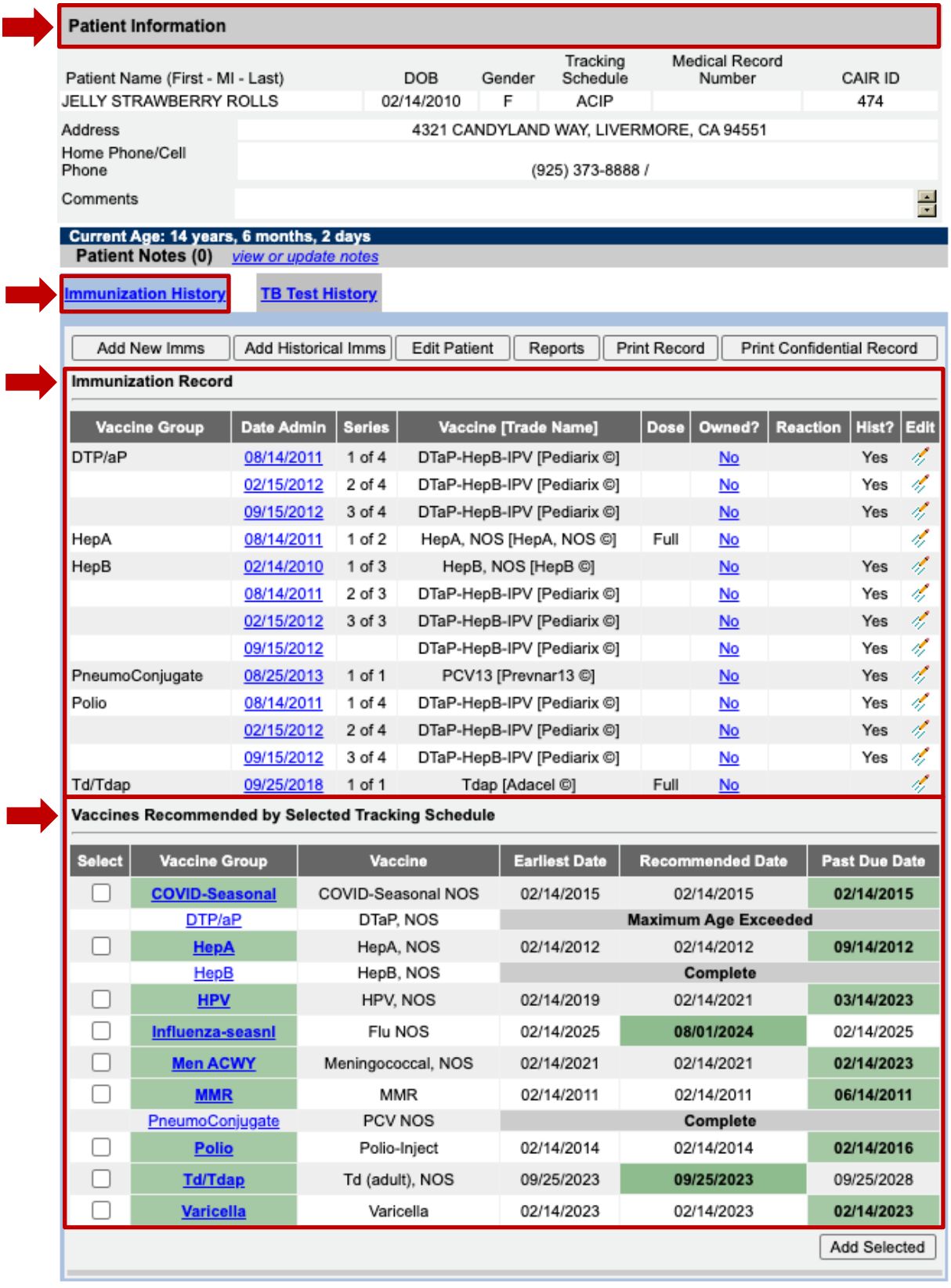
Important Note: Patient Notes should not be used for sensitive/confidential medical information. Once entered and saved, a Patient Note **cannot** be edited or deleted. If you accidentally included a confidential note, please contact the CAIR Help Desk as soon as possible so they can remove it on your behalf.



Section 6: Viewing Information in the History/Recommend Screen

The History/Recommend screen includes the patient's immunization history and recommendations for vaccines due according to the current ACIP immunization schedule (see screenshot below). Reviewing the patient's immunization history and vaccine recommendations in CAIR2 helps to prevent missed immunization opportunities.

To go to the 'History/Recommend' screen, click the **History/Recommend** button in the 'Update Patient' screen (see the Viewing/Editing Patient Information section):

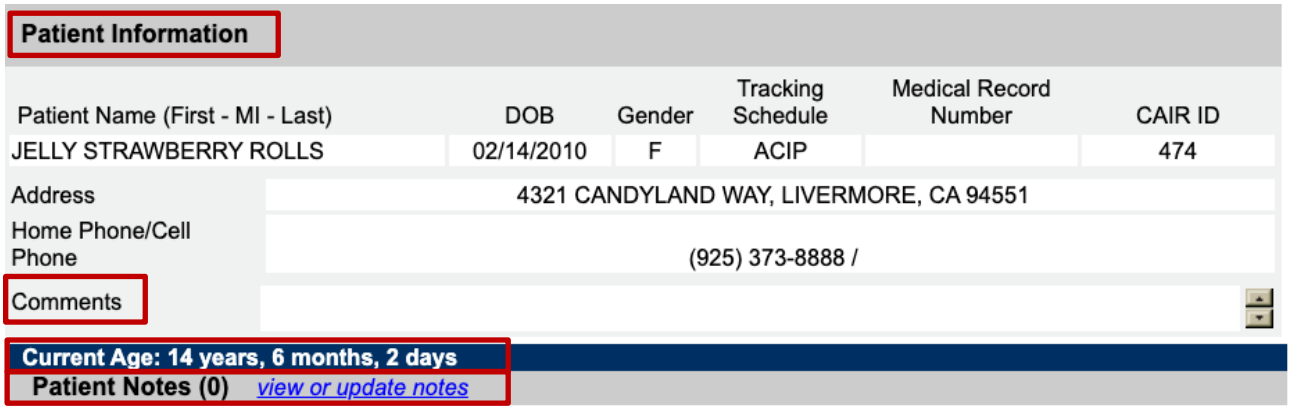


The 'History/Recommend' screen will default to the 'Immunization History' tab and contains the following sections (each section is described below):

- Patient Information

- Links to the 'Immunization History' and the 'TB Test History' tabs (**Note:** We do not cover the TB Test History tab in this guide. For more information, see the **CAIR2 TB User Guide** found on the CAIR2 User Guides Page.)
- Navigation buttons
- Immunization Record
- Vaccines Recommended by Selected Tracking Schedule

Patient Information



Note: Information in this section is not editable. To edit the information, go to the 'Update Patient' screen (see the Viewing/Editing Patient Information in CAIR2 section). This top section shows:

- **Patient Information:** Contains basic patient demographic and contact information.
- **Comments:** Lists in red any contraindications, immunity, or refusals documented in the patient's record (see the Patient Comments section).
- **Current Age:** The dark blue bar tells you the age the patient is today.
- **Patient Notes:** If a number is listed within the parenthesis, it'll indicate that a Patient Note is saved in the record.

Immunization History

This tab allows you to see the patient's immunization history and any vaccines that are due. The row of buttons under the 'Immunization History' tab allows you to navigate to different screens where you can add vaccines given, edit patient information, and print the patient's vaccine record/reports:

- **Add New Imms:** This allows you to add new immunizations given to the patient in their CAIR2 record (see the Reviewing Recommendations and Entering Vaccines section).
- **Add Historical Imms:** This allows you to add historical immunizations that were given to the patient in the past into their CAIR2 record (see the Adding Historical Immunizations section).
- **Edit Patient:** This takes you back to the 'Update Patient' screen, where you can make changes to the

patient's demographic information (see the Viewing/Editing Patient Information in CAIR2 section).

- **Reports:** This allows you to print different patient-level reports (see the Running Patient Reports section).
- **Print Record:** This allows you to print an exact copy of the 'History/Recommend' screen.
- **Print Confidential Record:** This allows you to print a copy of the 'History/Recommend' screen, but it will remove any contact information (e.g., address/phone number) and any recorded Patient Comments from the report.

Immunization Record

This section of the 'Immunization History' tab includes information about the immunizations the patient has already received. Each column provides information about the specific immunization that was given (described below):

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	10/14/2010	1 of 4	DTaP-HepB-IPV [Pediarix ©]		No		Yes	
	12/18/2010	2 of 4	DTaP, NOS [DTaP, NOS ©]				Yes	
	03/01/2011	3 of 4	DTaP-HepB-IPV [Pediarix ©]	Full				
HepB	02/14/2010	1 of 3	HepB, NOS [HepB ©]		No		Yes	
	10/14/2010	2 of 3	DTaP-HepB-IPV [Pediarix ©]		No		Yes	
	03/01/2011	3 of 3	DTaP-HepB-IPV [Pediarix ©]	Full				
	08/08/2016		HepB-Adult [Engerix-B Adult ©]				Yes	
Influenza-seasnl	08/08/2016	1 of 1	Flu NOS [Influenza, NOS ©]				Yes	
MMR	10/01/2010	NOT VALID	MMR [MMR II ©]	Full				
	07/10/2016	1 of 2	MMR [MMR II ©]	Full				
	08/08/2016	2 of 2	MMR [MMR II ©]	Full				
Polio	10/14/2010	1 of 4	DTaP-HepB-IPV [Pediarix ©]		No		Yes	
	12/18/2010	2 of 4	Polio-Inject [Polio ©]				Yes	
	03/01/2011	3 of 4	DTaP-HepB-IPV [Pediarix ©]	Full				

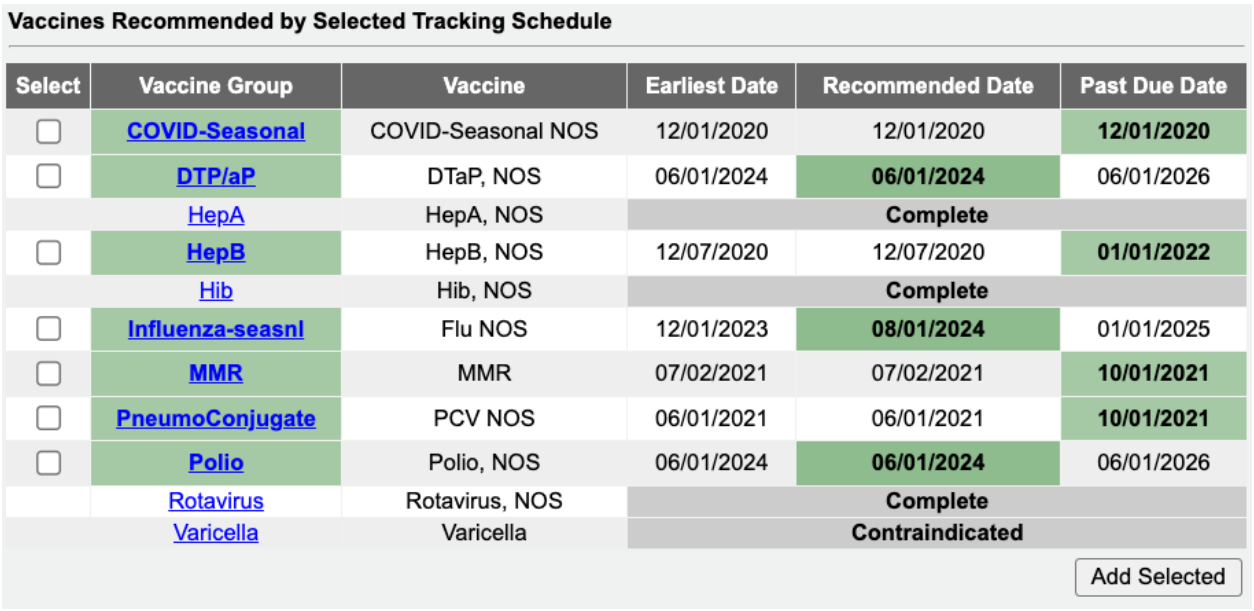
- **Vaccine Group:** The vaccines are listed in alphabetical order. If the patient received a combination vaccine (e.g., Pediarix), the vaccine will appear within each vaccine group for the components included in the combination vaccine (e.g., for Pediarix, the vaccine will appear within the DTP/aP, Hep B, and Polio Vaccine Groups).
- **Date Admin:** This shows the date the vaccine was administered. You can click on the hyperlink to view the series information for that vaccine and other information. If you hover your cursor over the hyperlink, a pop-up will appear, showing the patient's age during vaccine administration.
- **Series:** This shows where the vaccine counts in the series. If 'NOT VALID' or 'SUBPOTENT?' is displayed, you can click the **Date Admin** hyperlink for the specific vaccine to view an explanation. If the field is blank, an extra vaccine in the series was administered to the patient, and it didn't count toward the series. However, it is allowed by the Advisory Committee on Immunization Practices (ACIP) recommendations.
- **Vaccine [Trade Name]:** This shows the vaccine components and Trade Name for that immunization.
- **Dose:** This shows if the vaccine given to the patient was a 'Full' (standard) dose or if less or more than the standard dose was given. If this column is blank, the vaccine was entered as a historical dose, and it

should be assumed the dose was given as a full dose.

- **Owned?:** This shows which site **entered** the vaccine into CAIR2**. It is not necessarily which site gave the vaccine**. If it is blank, that means your site entered the vaccine. For example, if it is a historical vaccine and your site entered it into CAIR2, it will show your site as the 'owner', even if your site did not give that vaccine. If it says 'No', your site did not enter the vaccine. You can click the **No** hyperlink to see which site entered it and their contact information.
- **Reaction:** This shows if a reaction has been documented for this vaccine. The entire row will also appear in red text. You can click the red **Yes** hyperlink in this column to see a description of the reaction (see the Documenting a Reaction to a Vaccine section).
- **Hist?:** This shows if the vaccine was historical/transcribed. It will indicate a 'Yes' if the dose was transcribed into CAIR2 as a Historical vaccine (e.g., from a Yellow Card). This column will be blank if it was an administered dose (see the Adding Historical Immunizations section).
- **Edit:** This allows you to add/edit information about the vaccine (see the Editing/Deleting Vaccines section).

Vaccines Recommended by Selected Tracking Schedule

This section of the 'Immunization History' tab displays which vaccines are currently recommended for the patient. Vaccines that are due/overdue are highlighted in green. The use of this feature is explained in more detail in the Reviewing Recommendations and Entering New Vaccines section. If a vaccine series has been completed, it will show 'Complete' under the 'Recommended Date' column. If a vaccine is not recommended (e.g., based on a Patient Comment entered for the patient), it will show 'Contraindicated' or 'Immunity Recorded for Vaccine Group'.



Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☐	COVID-Seasonal	COVID-Seasonal NOS	12/01/2020	12/01/2020	12/01/2020
☐	DTP/aP	DTaP, NOS	06/01/2024	06/01/2024	06/01/2026
	HepA	HepA, NOS		Complete	
☐	HepB	HepB, NOS	12/07/2020	12/07/2020	01/01/2022
	Hib	Hib, NOS		Complete	
☐	Influenza-seasnl	Flu NOS	12/01/2023	08/01/2024	01/01/2025
☐	MMR	MMR	07/02/2021	07/02/2021	10/01/2021
☐	PneumoConjugate	PCV NOS	06/01/2021	06/01/2021	10/01/2021
☐	Polio	Polio, NOS	06/01/2024	06/01/2024	06/01/2026
	Rotavirus	Rotavirus, NOS		Complete	
	Varicella	Varicella		Contraindicated	

Add Selected

Note: The vaccine recommendations will be based on the tracking schedule that **was selected** for the patient (see the Organization Information section).

Section 7: Adding Historical Immunizations

Historical Immunizations are doses that were administered to the patient in the past. These are often brought in by the patient/parent on an immunization record (e.g., Yellow Card). It is important that all past immunizations the patient has received be entered into CAIR2 so that the recommendations for future immunizations are accurate.

Important Note: Your site is responsible for the historical immunizations entered for patients.

- It is important to obtain valid documentation of the patient's immunization record from the patient/parent (e.g., a Yellow Card, a valid printout from a provider's office, etc.) before entering historical vaccines into CAIR2. If you are not sure if the documentation provided is valid, you should follow up with the patient/parent before entering the doses into CAIR2.
- If your site has an EHR/EMR, confirm with your site manager if your site is sending Historical doses to CAIR2. Otherwise, you will need to **manually** add historical doses into patients' CAIR2 records.

For more detailed instructions on adding Historical Immunizations, you can view the **CAIR2 Guide to Adding Historical Immunizations** found on the CAIR2 User Guides Page.

Entering Single Historical Immunizations

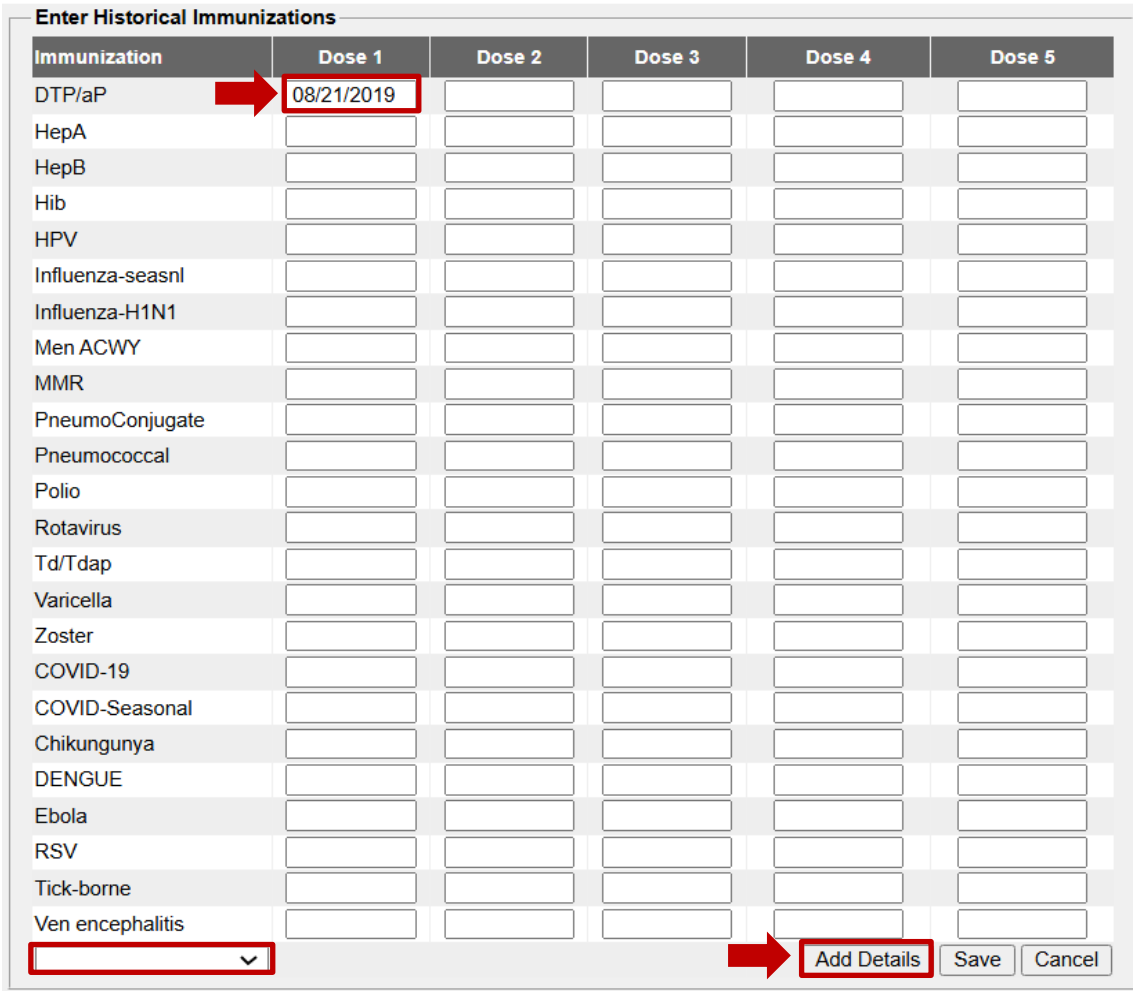
To enter single historical immunization(s):

1. Click the **Add Historical Imms** button in the 'Immunization History' tab.

2. On the screen that displays (see below), scroll down to the second half of the screen and look for the 'Enter Historical Immunizations' section. The vaccine groups you can choose from are in alphabetical order on the left side under the 'Immunization' column.
3. In the 'Dose 1' field next to the vaccine, enter the date the vaccine was given (see the DTaP example below). The date must be in MM/DD/YYYY format.

   Note: You can put the date into the 'Dose 1' column even if this isn't the first dose of that vaccine the patient has received. CAIR2 will automatically insert it as the correct dose in the series. For example, if the patient already had the first dose of DTaP recorded in CAIR2 and you are recording the second dose, you can enter it in the 'Dose 1' field; CAIR2 will automatically count it as the second dose in the series based on the date the patient received the vaccine.
4. If you have additional doses of the same vaccine to record (e.g., more than one DTaP), enter them in the columns listed (e.g., Dose 2, 3, etc.).

Important note: If you know the Trade Name of the vaccine (e.g., Daptacel), you should add it using the 'Add Details' button before saving the vaccine dates (see Entering Historical Combination (Combo) Vaccines subsection below). This is very important, especially for combo vaccines and single vaccines that have different vaccination schedules.

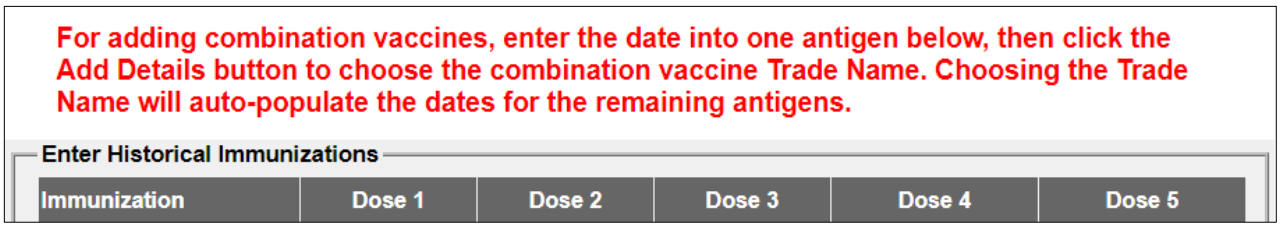


Note: If you need to enter a historical vaccine that is not listed on the screen, click the dropdown at the bottom of the 'Immunization' column to view more options and select any additional vaccine groups.

5. When you are finished, click the **Save** button at the bottom of the screen.

Entering Historical Combination (Combo) Immunizations

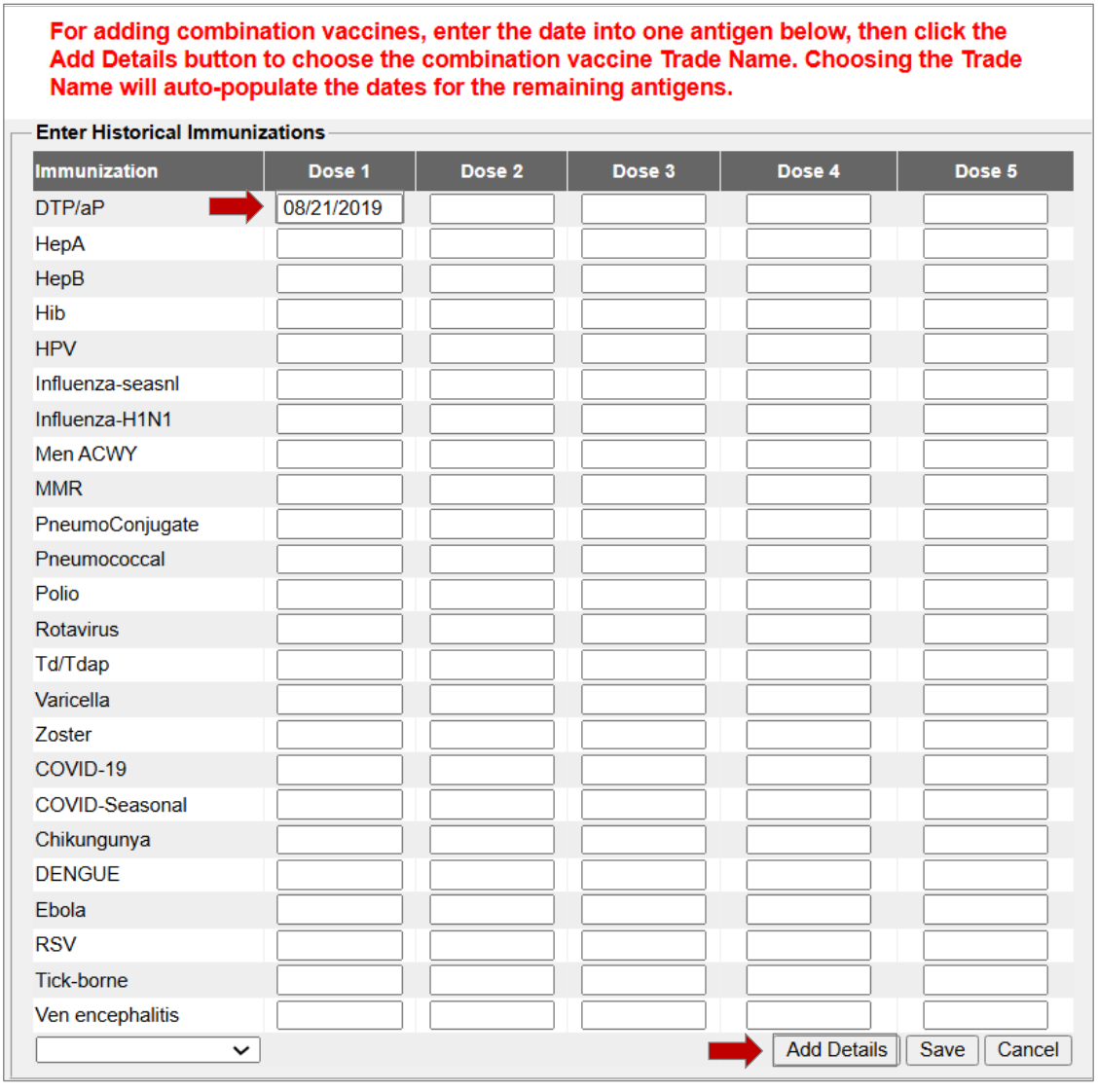
Note: Before entering a combination vaccine, please note the red message that displays at the top of the 'Enter Historical Immunizations' section regarding combination vaccines:



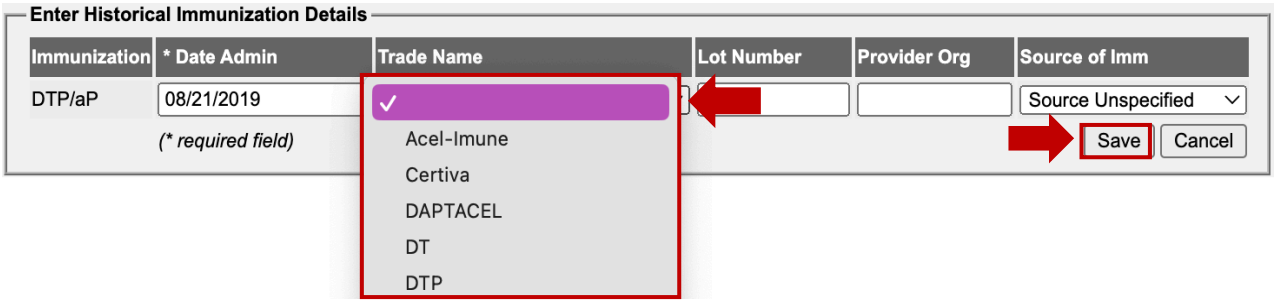
As the message states, when entering a historical combo vaccine (e.g., Pediarix, Pentacel), it is very important to include the Trade Name using the 'Add Details' button. This is because different vaccines have different schedules (e.g., Pediarix is a 3-dose series, whereas Pentacel is a 4-dose series). If you don't add the Trade Name, CAIR2 will not know which vaccine series it is, and future vaccine recommendations will not be accurate.

To enter historical combo immunization(s):

1. Enter the date the vaccine was given in the 'Dose 1' field for **only one of the vaccine's components**. For example, Pediarix is a combination of DTaP, HepB, and Polio, so you can choose to enter the date for any one of these components. Otherwise, you'll get a message stating that you're adding duplicate vaccines (see the Pop-Up Screens for New Administered Immunizations section). The screenshot below shows the vaccine date entered in the DTaP box.
2. Then click on the **Add Details** button at the bottom of the screen.



3. On the next screen that appears, scroll down to the 'Enter Historical Immunization Details' section and select the **Trade Name** (e.g., Pediarix).



Note: You can also use the 'Add Details' button to add other information if you have it (e.g., the Lot Number and the name of the provider who gave the vaccine). Also, you can choose the source from which the historical immunization was obtained (e.g., Other Provider, Parent Written Record, Other Registry, etc.).

4. Click the **Save** button. You will then be returned to the 'History/Recommend' screen. The vaccine information for each component in the vaccine will be automatically added to the patient's vaccine record and include the associated Trade Name.

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	08/21/2019	1 of 5	DTaP-HepB-IPV [Pediarix ©]				Yes	
HepB	08/21/2019	1 of 3	DTaP-HepB-IPV [Pediarix ©]				Yes	
Polio	08/21/2019	1 of 4	DTaP-HepB-IPV [Pediarix ©]				Yes	

Section 8: Reviewing Recommendations and Entering New Vaccines

Adding New Vaccines Using the Vaccines Recommended by Selected Tracking Schedule

New vaccines are administered vaccine doses that your site gave to the patient. Vaccines that are due or can be given today and count as valid will be shown in the 'Vaccines Recommended by Selected Tracking Schedule' section (see the Vaccines Recommended by Selected Tracking Schedule section).

- This section will only list vaccines that are part of the patient's selected tracking schedule's recommendations (see screenshot below). You can view and modify the patient's selected tracking schedule in the 'Organization Information' tab (see the Organization Information section).
- This section also lists routine vaccines for the patient, but you can enter non-routine vaccines (see the Entering New Vaccines Using the Add New Imms Button section). Future recommendations for non-routine vaccines will also display in this section.

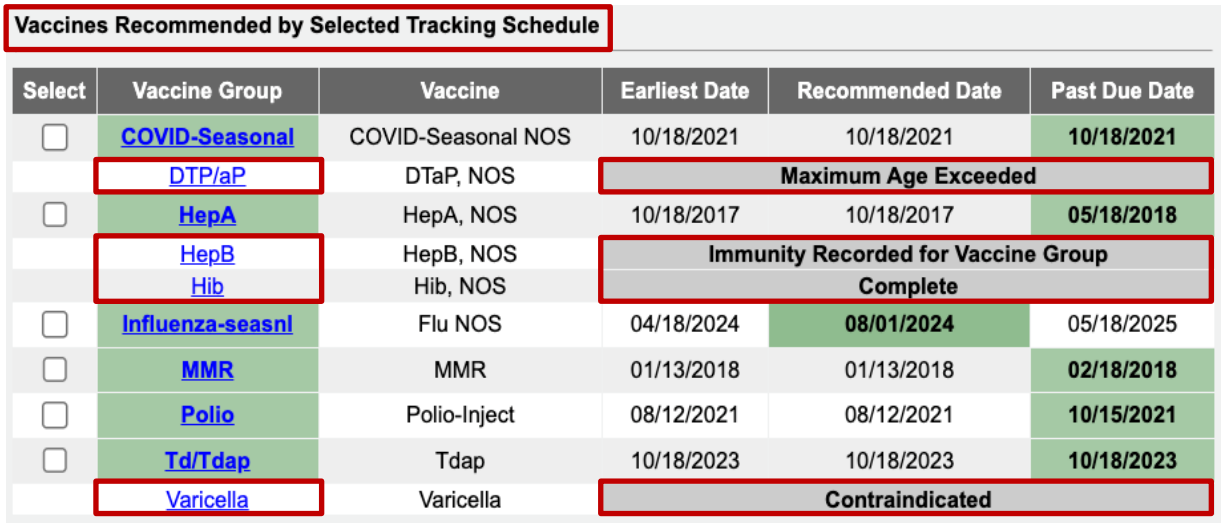
Note: If your site has an EHR/EMR, confirm with your site manager if your site is sending doses electronically to CAIR2. If you are, **do not** enter vaccines manually into CAIR2 because, in doing so, your site can result in adding duplicate data and/or creating error messages in CAIR2.

Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☐	COVID-Seasonal	COVID-Seasonal NOS	08/24/2022	08/24/2022	**08/24/2022**
☐	DTP/aP	DTaP, NOS	04/07/2022	04/24/2022	**05/24/2022**
☐	HepA	HepA, NOS	02/24/2023	02/24/2023	**09/24/2023**
☐	HepB	HepB, NOS	02/24/2022	05/24/2022	**05/24/2022**
☐	Hib	Hib, NOS	05/24/2023	05/24/2023	**05/24/2023**
☐	Influenza-seasnl	Flu NOS	08/24/2023	**08/01/2024**	09/24/2024
☐	MMR	MMR	02/24/2023	02/24/2023	**06/24/2023**
☐	PneumoConjugate	PCV13	02/24/2024	02/24/2024	**02/24/2024**
☐	Polio	Polio, NOS	04/07/2022	04/24/2022	**05/24/2022**
☐	Varicella	Varicella	02/24/2023	02/24/2023	**06/24/2023**

The columns in this section, ordered left to right, include the following:

- **Select:** Check off the box(es) for the immunization(s) your site gave and need to enter today.
- **Vaccine Group:** These are listed in alphabetical order. You can click on the hyperlink to see the schedule and series information for that vaccine and other information.
- **Vaccine:** This lists the vaccines in the group. **Note:** 'NOS' stands for Not Otherwise Specified.
- **Earliest Date:** This lists the earliest date the vaccine can be given and will count as a valid vaccine.
- **Recommended Date:** This is the recommended date the vaccine should be given, which is determined by the selected tracking schedule (includes the 4-day grace period). If the fields show (see screenshot below):
  - **Complete:** This indicates that the series has been completed according to the ACIP schedule.
  - **Contraindicated:** This indicates that the vaccine should not be given due to medical reasons (e.g., based on a Patient Comment entered for the patient).
  - **Maximum Age Exceeded:** This indicates that the patient has exceeded the maximum age to receive the vaccine. For example, if a patient has already reached the age of seven and has not completed the DTP/aP series, then the recommendation for DTP/aP will show as 'Maximum Age Exceeded'.
  - **Immunity Recorded for Vaccine Group:** This indicates that the patient is immune to the vaccine group based on clinical documentation.
- **Past Due Date:** This lists the date the patient is past due for the immunization. Any vaccine due or overdue per the tracking schedule will have its Vaccine Group column highlighted in green. If a vaccine is contraindicated, or the patient has aged out of that schedule, it will be noted in the 'Recommended Date' column, and the row for that vaccine group will be greyed out. The checkbox option in the 'Select' column will also be removed for that vaccine group.



Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☐	COVID-Seasonal	COVID-Seasonal NOS	10/18/2021	10/18/2021	10/18/2021
	DTP/aP	DTaP, NOS	Maximum Age Exceeded		
☐	HepA	HepA, NOS	10/18/2017	10/18/2017	05/18/2018
	HepB	HepB, NOS	Immunity Recorded for Vaccine Group		
	Hib	Hib, NOS	Complete		
☐	Influenza-seasnl	Flu NOS	04/18/2024	08/01/2024	05/18/2025
☐	MMR	MMR	01/13/2018	01/13/2018	02/18/2018
☐	Polio	Polio-Inject	08/12/2021	08/12/2021	10/15/2021
☐	Td/Tdap	Tdap	10/18/2023	10/18/2023	10/18/2023
	Varicella	Varicella	Contraindicated		

According to the example (screenshot above), the patient:

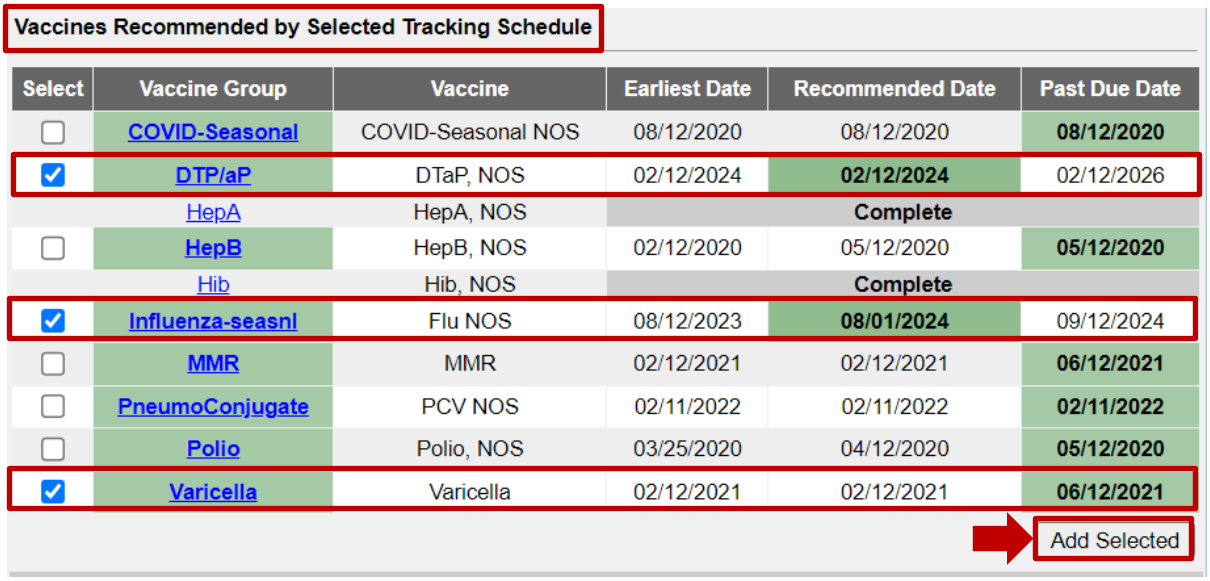
- Is due/overdue and should receive the following vaccines today: COVID, HepA, MMR, Polio, and Tdap.
- Is able to receive a Flu vaccine and have it count as a valid dose.
- Has completed the Hib series, Varicella is contraindicated.
- Is immune to HepB, so the patient should not receive these vaccines.
- Has aged out of the schedule for DTap, so they should not receive another dose of this vaccine.

Sites Using the CAIR2 Inventory Feature:

To add new doses in CAIR2 for sites that will be using the inventory feature, follow the steps below:

1. Select the checkbox(es) in the 'Select' column for the vaccine(s) you want to enter.

   Note: If you are entering a Combo vaccine (e.g., Pediarix), you only need to select the checkbox for one of the vaccine's components. For example, Pediarix is a combination of DTaP, HepB, and Polio. You just need to select the checkbox next to one of the components of the group. The screenshot below shows DTaP as being selected. You will be able to select the Trade Name 'Pediarix' on the screen that follows.



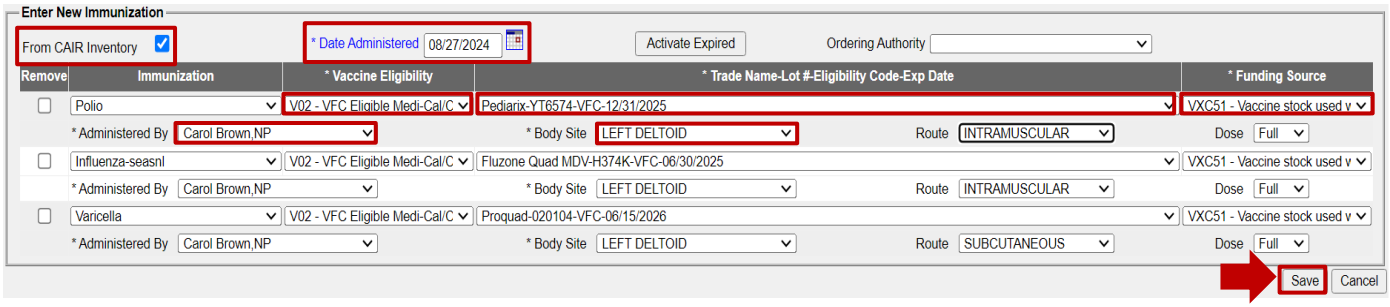
Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☐	COVID-Seasonal	COVID-Seasonal NOS	08/12/2020	08/12/2020	08/12/2020
☑	DTP/aP	DTaP, NOS	02/12/2024	02/12/2024	02/12/2026
	HepA	HepA, NOS	Complete		
☐	HepB	HepB, NOS	02/12/2020	05/12/2020	05/12/2020
	Hib	Hib, NOS	Complete		
☑	Influenza-seasnl	Flu NOS	08/12/2023	08/01/2024	09/12/2024
☐	MMR	MMR	02/12/2021	02/12/2021	06/12/2021
☐	PneumoConjugate	PCV NOS	02/11/2022	02/11/2022	02/11/2022
☐	Polio	Polio, NOS	03/25/2020	04/12/2020	05/12/2020
☑	Varicella	Varicella	02/12/2021	02/12/2021	06/12/2021

Add Selected

2. Click on the **Add Selected** button in the bottom right corner of the screen.

3. On the screen that appears, scroll down to the 'Enter New Immunization' section.



Important Note: If your clinic uses the Inventory feature in CAIR2, the 'From CAIR Inventory' box should automatically be checked, and the vaccines you enter will deduct doses from your site's CAIR2 inventory.

If the 'From CAIR Inventory' box is **not** checked and your site has active inventory in CAIR2, make sure to **check the box** before proceeding to document the vaccine information. The following pop-up will display. Click the **OK** button.

Once the box is checked, it will default to that setting, and moving forward, the doses you document in patient records will be deducted from your Inventory.

For more information about using the CAIR2 Inventory feature, refer to the **CAIR2 Inventory User (Power) Guide** found on the CAIR2 User Guides Page. If your site is not using the CAIR2 Inventory feature, follow the steps in the Sites Not Using the CAIR2 Inventory Feature section below.

4. **Date Administered:** This field will default to today's date. If the vaccine(s) was administered on a different date, make sure to enter/select the correct date.

   Next to 'Date Administered', there is an optional button and field:

   - **Activate Expired:** If a vaccine was administered to the patient, but the vaccine lot expired before being able to document it in the patient's record, you can activate the vaccine lot using this button to document the vaccine for the patient. Contact your LCR to request the document that includes the step-by-step instructions on how to activate expired lots.
   - **Ordering Authority:** This optional field can be used to document which staff member at your site ordered (authorized) that the vaccine be given to the patient. The dropdown will only be populated if your site uses this field and a manager/supervisor has submitted staff members to be listed here via a CAIR2 Account Update request.

5. Select each blank field in the 'Enter New Immunization' section for each vaccine given:
   - **Immunization:** This field will auto-populate with the vaccine(s) that you selected on the previous screen but will only display if you have that vaccine in your CAIR2 inventory.

- **Vaccine Eligibility:** You must select the patient's eligibility status from the Vaccine Eligibility dropdown before choosing the lot information in the Trade Name/Lot Number/Funding Source field. **Note:** If you are a state-supplied vaccine provider (e.g., VFC, SGF, 317) and notice you cannot select a state-supplied vaccine eligibility from this dropdown, contact your Local CAIR Representative (LCR) and ask that they update your state-supplied vaccine provider status. Otherwise, when documenting vaccines manually in CAIR2, you won't be able to document VFC, SGF, or 317 eligibilities.
- **Trade Name-Lot #-Eligibility Code-Exp Date:** Select the lot number from the dropdown list for the vaccine you gave the patient. Only those lots available in your CAIR2 inventory for the selected funding source will display. If you do not see that lot number listed, check with your site's Inventory Manager (Power User). **Do not select an option from the dropdown field if you did not give that Trade Name/lot number to the patient.**
- **Funding Source:** You must select the correct Funding Source based on the following criteria.
  - VXC50: This option is for the Bridge Access Program (BAP) vaccines and are considered 'private' stock. These vaccines are provided by CDC and the provider did not purchase them.
  - VXC51: This option is for entering VFC vaccines.
  - VXC52: This option is for entering both 317 and SGF vaccines.
  - PHC70: This option is for truly 'private' vaccines (provider purchased it with their own money).
- **Administered By:** Select the name of the staff member who administered the vaccine to the patient. If the staff member's name is not shown, have your supervisor submit an Account Update request to add the Shotgiver name and title.
- **Body Site:** Select the anatomical site where the vaccine was administered (e.g., Left Deltoid).
- **Route:** Select the route the vaccine was administered (e.g., Intramuscular). For certain vaccines, this field may auto-populate with the most commonly used route. **Note:** This field is not required, but it is recommended as a vaccine documentation standard.
- **Dose:** This defaults to 'Full' dose (the standard dose based on the patient's age and type of vaccine). You can select a different amount if more or less than the standard dose was given.

6. Verify that you have entered the correct information in the required fields, then click the **Save** button. You will be taken back to the patient's 'Immunization Record'.

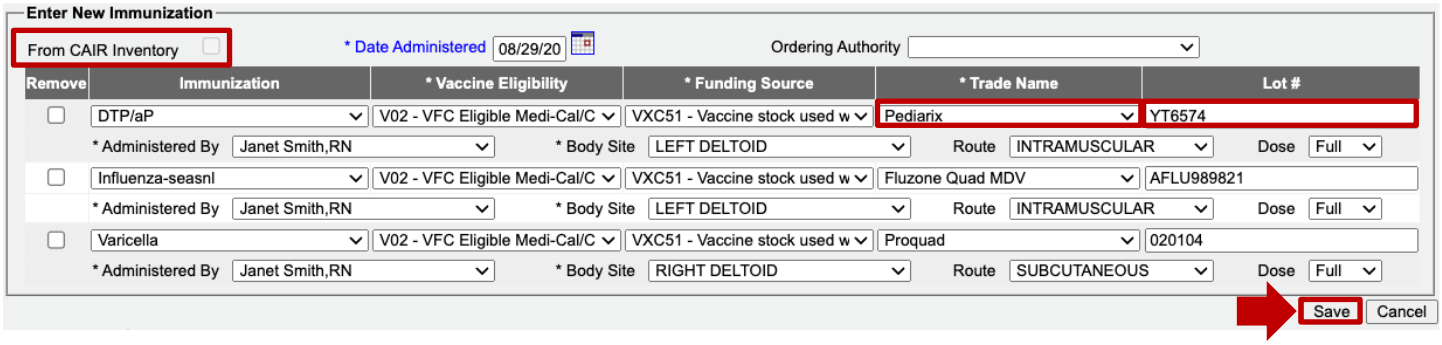
Sites Not Using the CAIR2 Inventory Feature:

To add new doses in CAIR2 for sites that will not be using the inventory feature, follow the steps below:

1. Follow the first two steps in the Sites Using the CAIR2 Inventory Feature section above.
2. On the screen that appears, scroll down to the 'Enter New Immunization' section and enter/select each blank field for each vaccine given, as mentioned in the Sites Using the CAIR2 Inventory Feature section #4-5.

Note: Since your site is not using the CAIR2 Inventory feature, the 'From CAIR Inventory' box should automatically be greyed out. However, if it is checked, make sure to uncheck it, and the following pop-up will display. Click the **OK** button.

You must also manually type in the 'Trade Name' and 'Lot #' fields.



3. Verify that you have entered the correct information in the required fields, then click the **Save** button. You will be taken back to the patient's 'Immunization Record'.

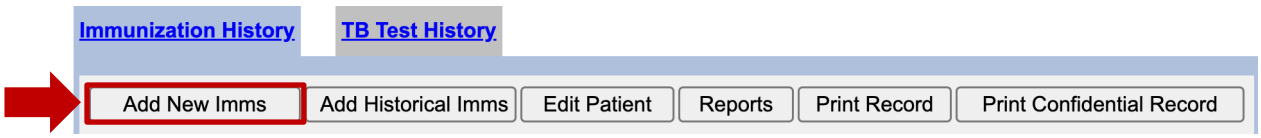
Entering New Vaccines Using the Add New Imms Button

You may need to enter vaccines not shown in the 'Vaccines Recommended by Selected Tracking Schedule' section, such as non-routine immunizations (e.g., Rabies, Meningococcal B). These vaccines can be entered into CAIR2 using the **Add New Imms** button.

Note: Once you record the first dose of the vaccine in CAIR2, future doses will be recommended in the 'Vaccines Recommended by Selected Tracking Schedule' section.

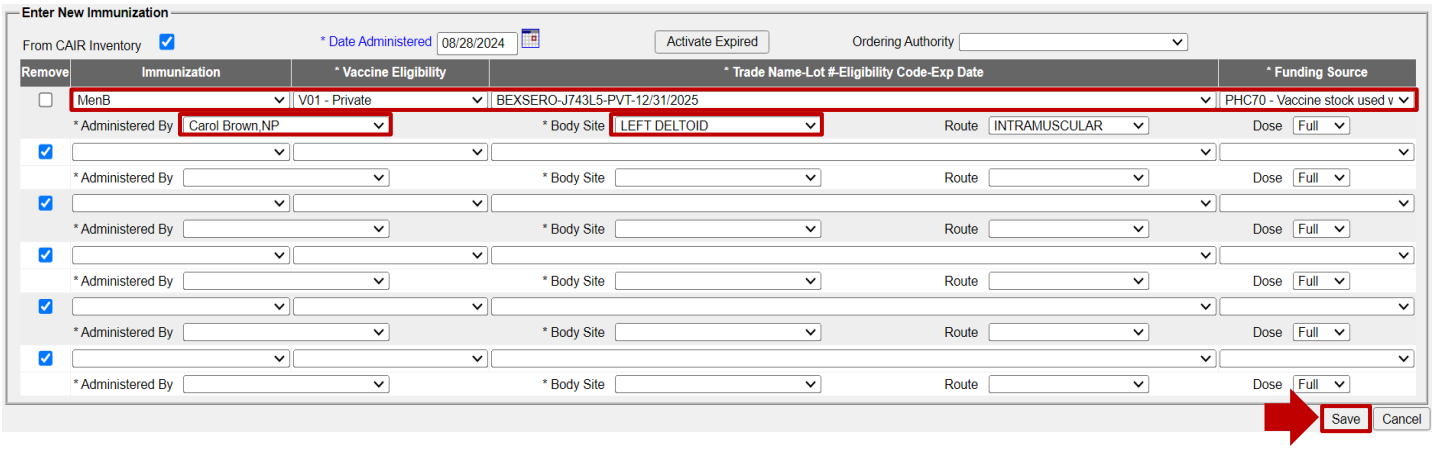
To enter new vaccines using the Add New Imms button, follow the steps below:

1. Click the **Add New Imms** button in the 'Immunization History' tab to add a new vaccine.



2. On the screen that appears (see screenshot below), scroll down to the 'Enter New Immunization' section and enter/select the information in the following fields as mentioned in the Sites Using the CAIR2 Inventory Feature and the Sites Not Using the CAIR2 Inventory Feature sections above, depending on whether your site uses the CAIR2 Inventory feature.

Note: You must select the vaccine group in the 'Immunization' column since you did not use the 'Vaccines Recommended by Selected Tracking Schedule' section. Select **only one of the vaccine's components** when documenting combo vaccines (e.g., for Pediarix, you would select DTaP, HepB, or Polio). Otherwise, you'll get a message stating that you're adding duplicate vaccines (see the Pop-Up Screens for New Administered Immunizations section). You can enter up to 6 vaccines at the same time on this screen.



3. Verify that you have entered the correct information in the required fields, then click the **Save** button. You will be taken back to the patient's 'Immunization Record'.

Note: Once you have entered and saved the vaccines, you will be returned to the patient's 'Immunization Record'. It is best practice to review all the vaccines you entered to ensure the information is correct. Based on the vaccines you entered, the recommendations for future vaccines will be updated.

Section 9: Pop-Up Screens for Duplicate Immunizations Found

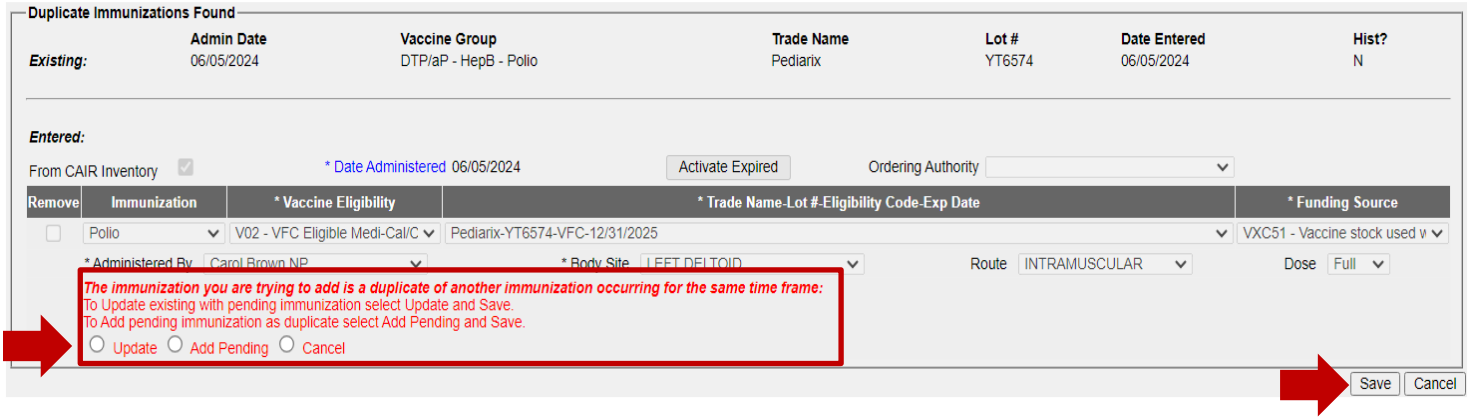
CAIR2 has been designed to identify duplicate or similar vaccines (within 14 days of one another) that are entered in CAIR2 as either new or historical. If a vaccine is entered and is identified as an exact match or similar to another, CAIR2 will display a pop-up that may allow the option to select which vaccine(s) to keep. Below are the different pop-up screens that will appear when a duplicate or similar vaccine is added to a patient's record.

Pop-Up Screens for New Administered Immunizations

When a new **administered** vaccine is added, and an existing **administered** vaccine is already in the patient's record by the same org, and there was **no change** to any of the following:

- Vaccine
- Date Administered
- Clinician/Shotgiver
- Lot number

Then, the following pop-up message will appear (see screenshot below):



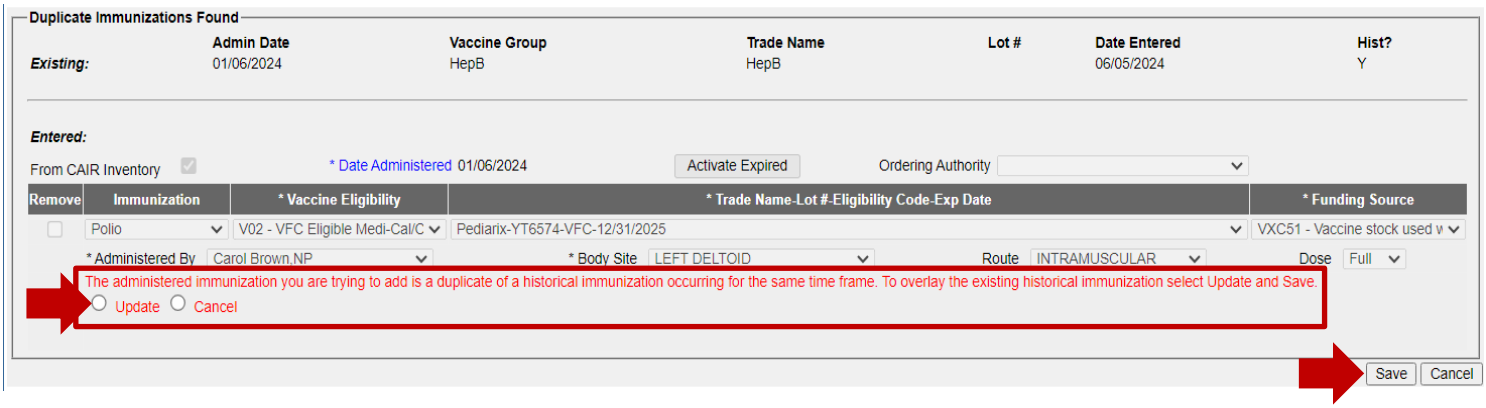
- **To replace/update the existing vaccine with the pending vaccine (i.e., the vaccine you just entered):** Select the **Update** radio button and click **Save**. This confirms that if you reviewed the information between the existing and pending vaccine and the existing vaccine has incorrect information you want to update with the one you are entering.
- **To add the pending vaccine as a duplicate vaccine:** Select the **Add Pending** radio button and click **Save**. This confirms that you want to add the vaccine you just entered.
- **To cancel and not make any changes or updates:** Click on the **Cancel** radio button.

Note: If the 'Add Pending' radio button is selected, the vaccine will be listed twice in the patient's record, and it will show as 'Not Valid'.

When a new **administered** vaccine is added, and an existing **historical** vaccine is already in the patient's record, and there **is a change** to any of the following:

- Vaccine
- Date Administered
- Clinician/Shotgiver

The following message will appear:

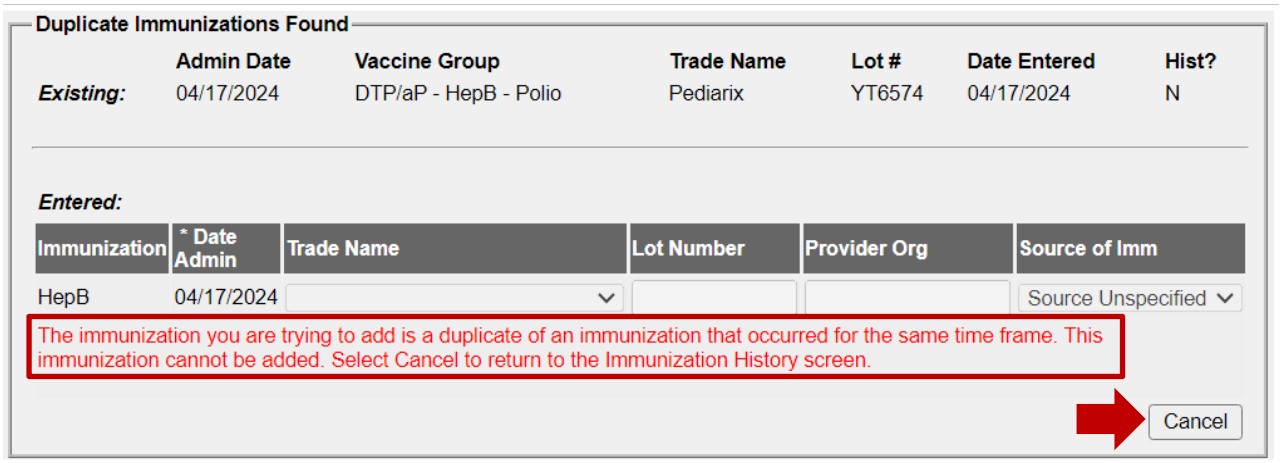


- **To update the existing vaccine with the pending vaccine (i.e., the vaccine you just entered):** Select the **Update** radio button and click **Save**. This confirms that if you reviewed the information between the existing and pending vaccine and the existing vaccine has incorrect/additional information, you want to update with the one you are entering. The new **administered** immunization will overwrite the existing **historical** vaccine.

- **To cancel and not make any changes or updates:** Click on the **Cancel** radio button.

Pop-Up Screens for Historical Immunizations

When a **historical** vaccine is added, and an existing **administered** vaccine is already in a patient's record by another or the same organization, CAIR2 identifies it as a duplicate dose, and the system will display the following message after attempting to save the vaccine(s):

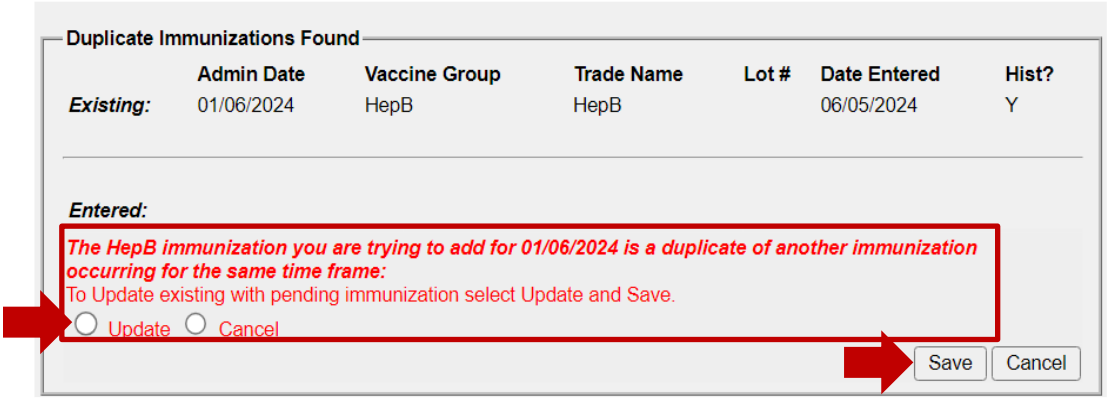


The vaccine cannot be added, and you must click **Cancel** to return to the previous screen.

When a **historical** vaccine is added, and an existing **historical** vaccine is already in a patient's record by the **same** organization, and there is **no change** to any of the following:

- Vaccine
- Date Administered
- Clinician/Shotgiver

CAIR2 will identify it as a duplicate dose, and the system will display the following message after attempting to save:



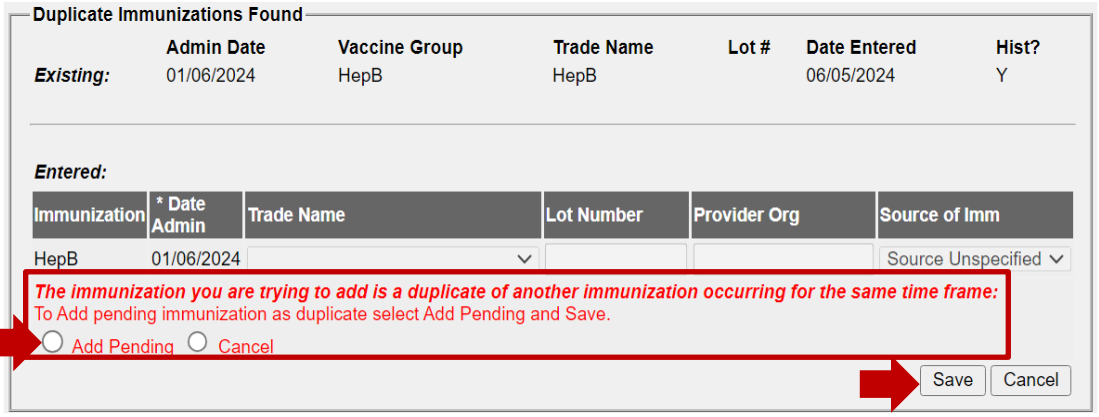
- **To update the existing vaccine with the pending vaccine (i.e., the vaccine you just entered):** Select the **Update** radio button and click on **Save**. This confirms that you reviewed the information between the existing and pending vaccines, and the existing vaccine has incorrect/additional information you want to update with the one you are entering.

- **To cancel and not make any changes or updates:** Click on the **Cancel** radio button to return to the previous screen.

When a **historical** vaccine is added, and an existing **historical** vaccine is already in a patient's record by **another** organization, and there is **no change** to any of the following:

- Vaccine
- Date administered
- Clinician/Shotgiver
- Lot Number

CAIR2 will identify it as a duplicate dose, and the system will display the following message after the user attempts to save:



- **To add the pending vaccine (i.e., the vaccine you just entered):** Select the **Add Pending** radio button and click on **Save**. This confirms that you reviewed the information between the existing and pending vaccines, and the existing vaccine has incorrect/additional information you want to update with the one you are entering.
- **To cancel and not make any changes or updates:** Click on the **Cancel** radio button.

Section 10: Editing/Deleting Vaccines

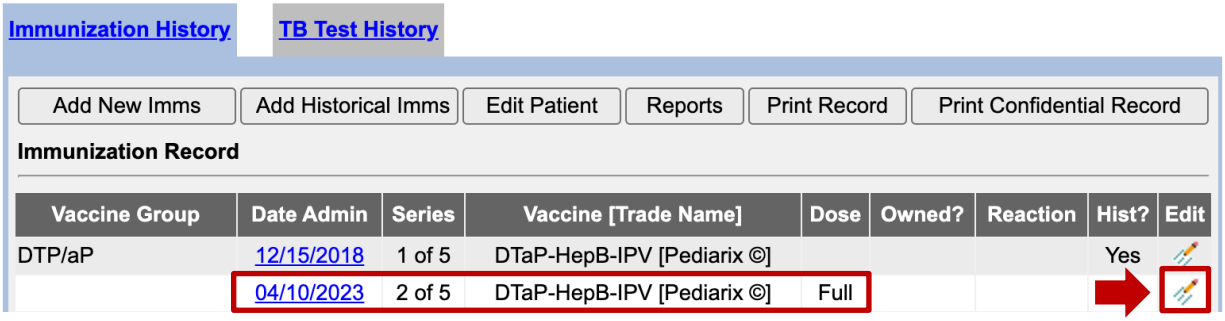
You may occasionally need to correct errors for a vaccine documented in CAIR2 (e.g., changing the injection site from right to left arm). Some vaccine information can be modified or deleted, depending on who entered/submitted the information to CAIR2.

Editing/Deleting Administered Vaccines

You can only edit/delete vaccines entered into CAIR2 as administered doses (i.e., non-historical) if your site administered the vaccines. You cannot edit/delete administered vaccines given by other providers. You can identify if a different provider entered the vaccine information by referring to the 'Owned?' column (see the Immunization Record section).

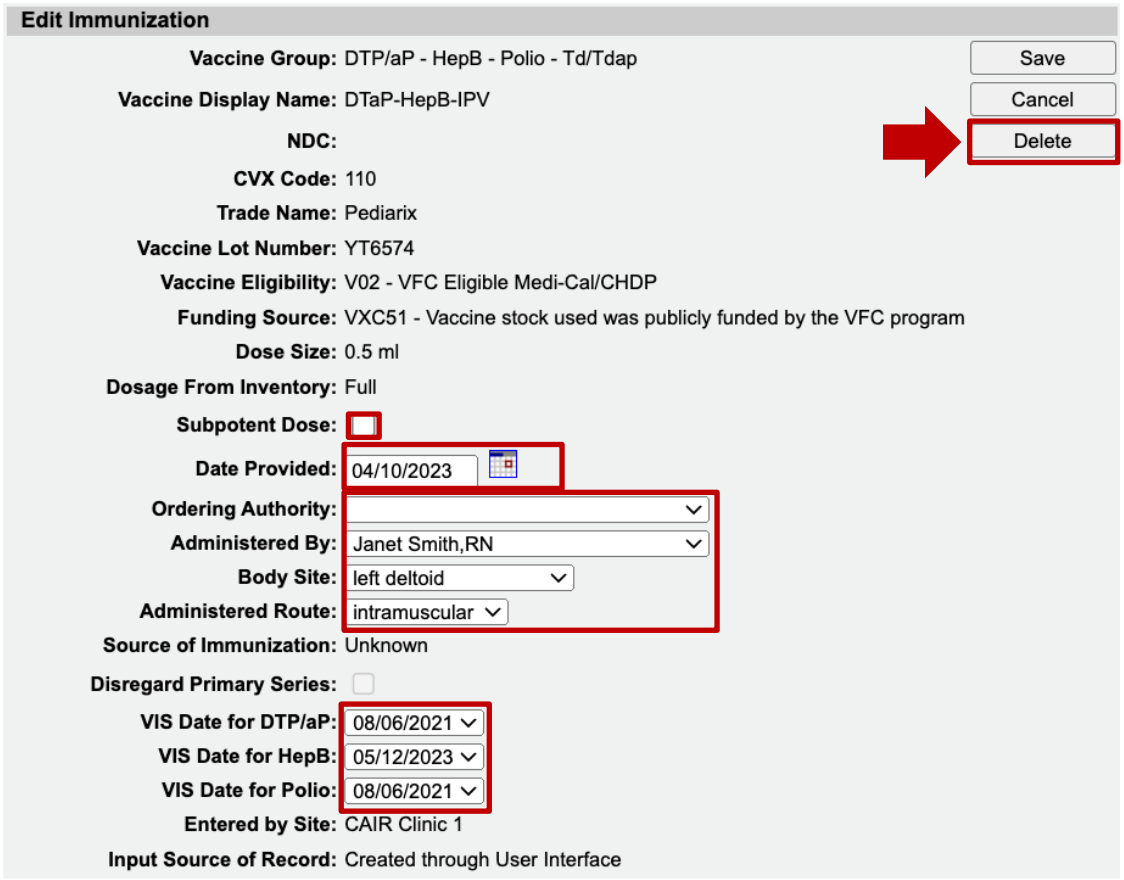
To edit or delete a vaccine that was administered by your site:

1. Go to the patient's 'History/Recommend' screen.
2. In the 'Immunization Record' section of the screen, click on the icon in the 'Edit' column next to the vaccine you need to edit.



3. The 'Edit Immunization' screen will appear for that vaccine. You can only edit/add information on this screen in the Date Provided (date administered), Ordering Authority, Administered By, Body Site, Administered Route, and VIS Date fields. You can also mark a dose as a 'Subpotent Dose' (see the Noting a Subpotent Dose section below). You can also delete the vaccine by clicking on the **Delete** button (e.g., you need to edit the information that is greyed out on this screen and will need to enter the information again).

   Note: You only need to delete/modify one entry for combo vaccines. Each vaccine entry in that combo vaccine will be automatically modified/removed from the patient's immunization history.



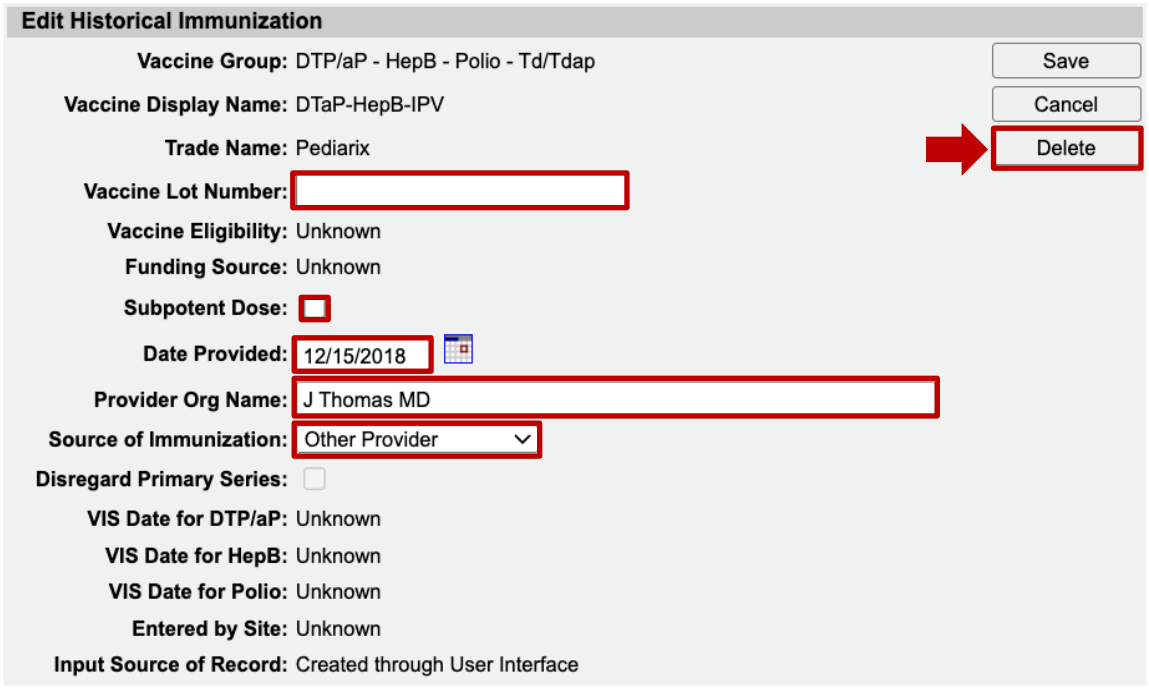
Editing/Deleting Historical Vaccines

You can edit or delete any historical vaccines entered by your site or another site in CAIR2.

Note: You should only edit/delete a vaccine given by another provider if you are absolutely sure the changes/deletions should be done.

To edit or delete a historical immunization:

1. Go to the patient's 'History/Recommend' screen.
2. In the 'Immunization Record' section of the screen, click on the icon in the 'Edit' column next to the historical vaccine you need to edit/delete. **Note:** You can tell if it is a historical vaccine if it says **'Yes'** in the 'Hist?' column.
3. The 'Edit Historical Immunization' screen will appear for that vaccine. You can only edit/add information for the Vaccine Lot Number, Date Provided, Provider Org Name, and Source of Immunization on this screen. You can also mark a dose as a 'Subpotent Dose' (see the Noting a Subpotent Dose section below). You can also delete the vaccine by clicking on the **Delete** button.



Noting a Subpotent Dose

Doses marked as subpotent will display under the Series column as 'SUBPOTENT?'. These are often because the vaccine that was administered to the patient had expired or had been stored or administered incorrectly. Subpotent doses are considered invalid vaccines in CAIR2 (but can be counted for School entry requirements). If you click on the hyperlink of the dose date, a pop-up will appear and it will give an explanation.

Polio	08/03/2017	1 of 3	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	10/12/2017	2 of 3	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	04/10/2023	SUBPOTENT?	Polio-Inject [IPOL ©]	Full				

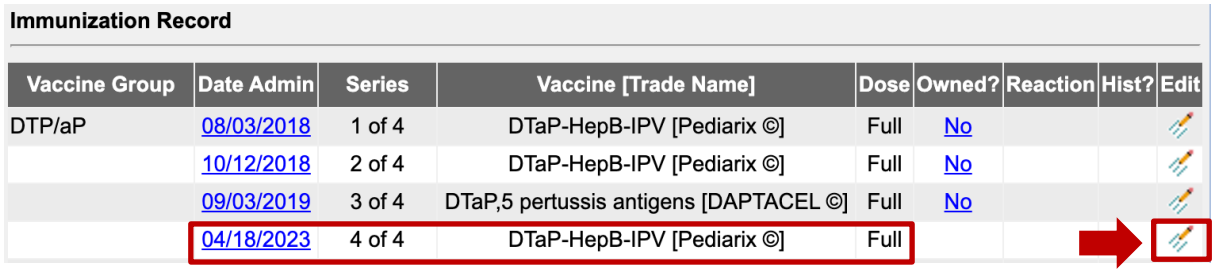
Note: When a combo vaccine is noted as subpotent, each component administered as part of the combo vaccine will be shown as subpotent in the patient's record.

Section 11: Documenting a Reaction to a Vaccine

Reactions (e.g., anaphylactic reaction) are very important for patient care and should be recorded in the patient's CAIR2 record. Reactions do not remove the vaccine from the 'Vaccines Recommended by Selected Tracking Schedule', but they do alert other CAIR2 users that a Reaction occurred.

If your patient has a reaction to a vaccine:

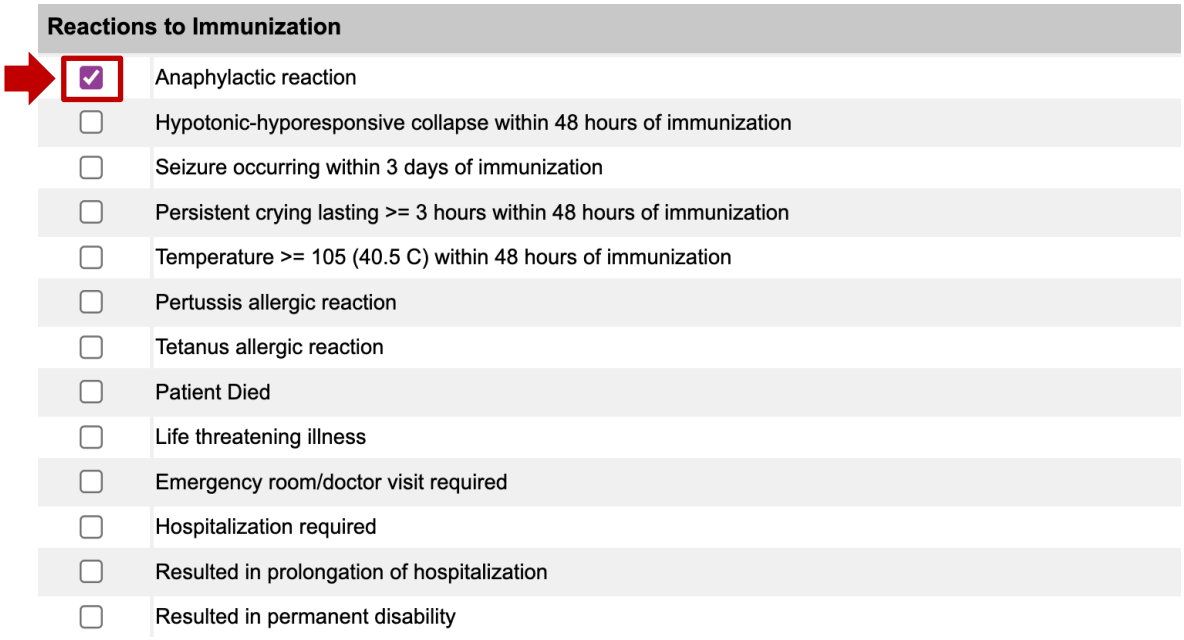
1. Go to the patient's 'History/Recommend' screen.
2. In the 'Immunization Record' section of the screen below, click on the icon in the 'Edit' column next to the vaccine the patient had a reaction to.



Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	08/03/2018	1 of 4	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	10/12/2018	2 of 4	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	09/03/2019	3 of 4	DTaP,5 pertussis antigens [DAPTACEL ©]	Full	No			
	04/18/2023	4 of 4	DTaP-HepB-IPV [Pediarix ©]	Full				

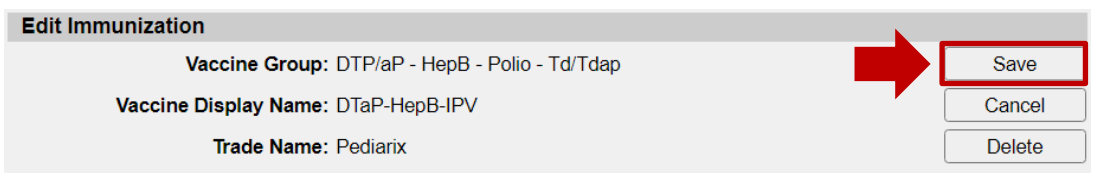
3. Scroll to the bottom of the screen to see the 'Reactions to Immunization' section. Click on the check box next to the reaction the patient experienced.



Reactions to Immunization

- [x] Anaphylactic reaction
- [ ] Hypotonic-hyporesponsive collapse within 48 hours of immunization
- [ ] Seizure occurring within 3 days of immunization
- [ ] Persistent crying lasting >= 3 hours within 48 hours of immunization
- [ ] Temperature >= 105 (40.5 C) within 48 hours of immunization
- [ ] Pertussis allergic reaction
- [ ] Tetanus allergic reaction
- [ ] Patient Died
- [ ] Life threatening illness
- [ ] Emergency room/doctor visit required
- [ ] Hospitalization required
- [ ] Resulted in prolongation of hospitalization
- [ ] Resulted in permanent disability

4. Then click on the **Save** button at the top right of the screen.

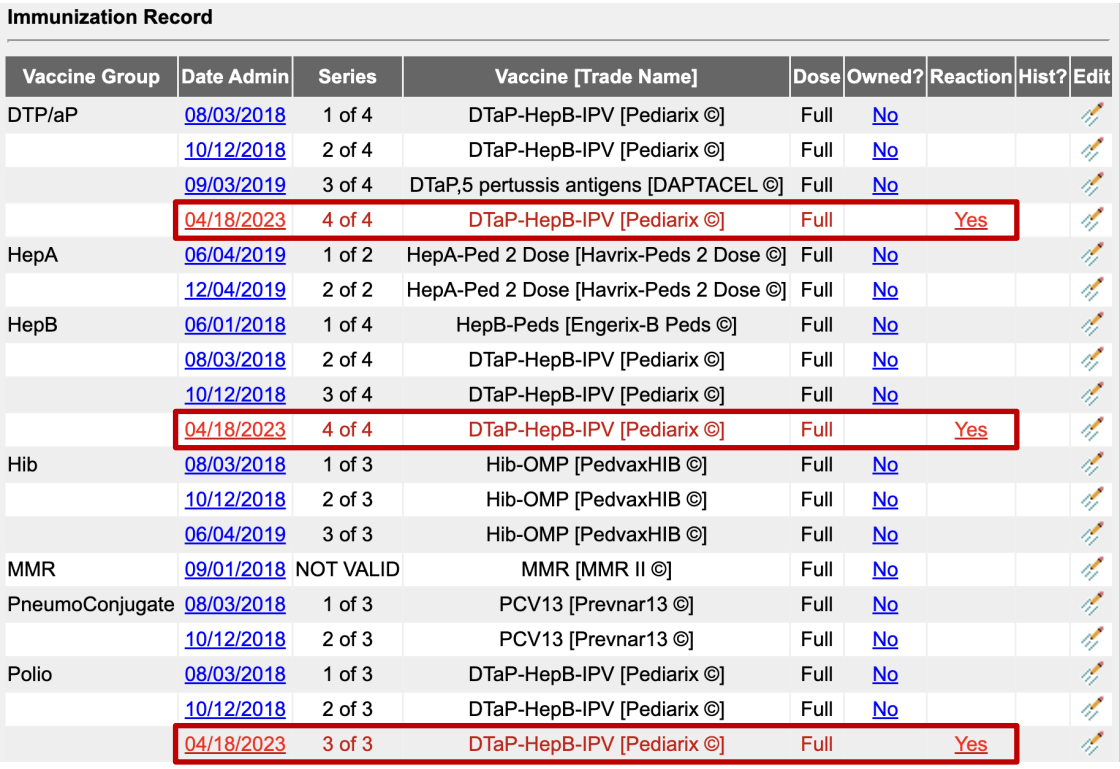


Edit Immunization

Vaccine Group: DTP/aP - HepB - Polio - Td/Tdap
Vaccine Display Name: DTaP-HepB-IPV
Trade Name: Pediarix

Save | Cancel | Delete

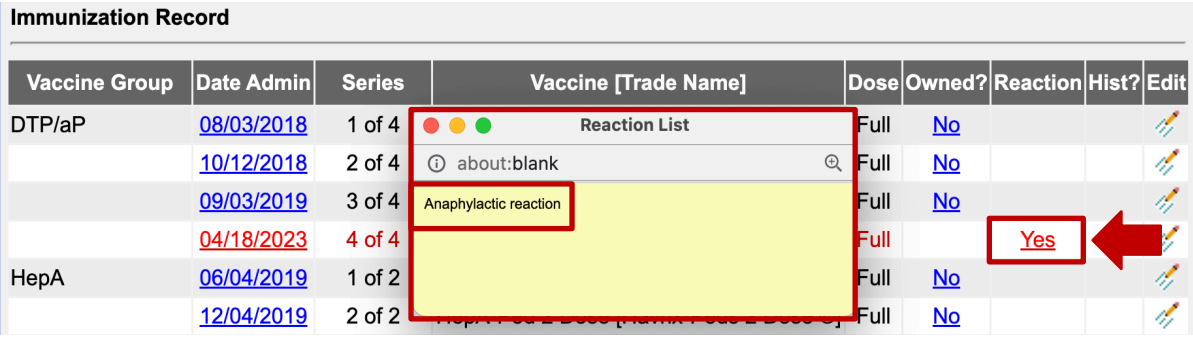
5. You will be taken back to the patient's 'Immunization Record', and the vaccine information will change to red. If the patient had a reaction to a combo vaccine (e.g., Pediarix), all the components of the combo vaccine will also change to red.



Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	08/03/2018	1 of 4	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	10/12/2018	2 of 4	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	09/03/2019	3 of 4	DTaP,5 pertussis antigens [DAPTACEL ©]	Full	No			
	04/18/2023	4 of 4	DTaP-HepB-IPV [Pediarix ©]	Full		Yes		
HepA	06/04/2019	1 of 2	HepA-Ped 2 Dose [Havrix-Peds 2 Dose ©]	Full	No			
	12/04/2019	2 of 2	HepA-Ped 2 Dose [Havrix-Peds 2 Dose ©]	Full	No			
HepB	06/01/2018	1 of 4	HepB-Peds [Engerix-B Peds ©]	Full	No			
	08/03/2018	2 of 4	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	10/12/2018	3 of 4	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	04/18/2023	4 of 4	DTaP-HepB-IPV [Pediarix ©]	Full		Yes		
Hib	08/03/2018	1 of 3	Hib-OMP [PedvaxHIB ©]	Full	No			
	10/12/2018	2 of 3	Hib-OMP [PedvaxHIB ©]	Full	No			
	06/04/2019	3 of 3	Hib-OMP [PedvaxHIB ©]	Full	No			
MMR	09/01/2018	NOT VALID	MMR [MMR II ©]	Full	No			
PneumoConjugate	08/03/2018	1 of 3	PCV13 [Prevnar13 ©]	Full	No			
	10/12/2018	2 of 3	PCV13 [Prevnar13 ©]	Full	No			
Polio	08/03/2018	1 of 3	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	10/12/2018	2 of 3	DTaP-HepB-IPV [Pediarix ©]	Full	No			
	04/18/2023	3 of 3	DTaP-HepB-IPV [Pediarix ©]	Full		Yes		

6. The type of reaction documented can be viewed by clicking on the red **Yes** hyperlink in the 'Reaction' column. A pop-up will display the reaction type.



Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	08/03/2018	1 of 4		Full	No			
	10/12/2018	2 of 4		Full	No			
	09/03/2019	3 of 4		Full	No			
	04/18/2023	4 of 4		Full		Yes		
HepA	06/04/2019	1 of 2		Full	No			
	12/04/2019	2 of 2		Full	No			

Important Note: If your site documented a reaction in the patient's CAIR2 record, you must also report the reaction to the Vaccine Adverse Event Reporting System (VAERS).

Section 12: Viewing/Entering Tuberculosis (TB) Test History

The TB Test History section of CAIR2 is not covered in this guide. For more detailed information on accessing/entering TB Test history, see the **CAIR2 TB User Guide** found on the CAIR2 User Guides Page.

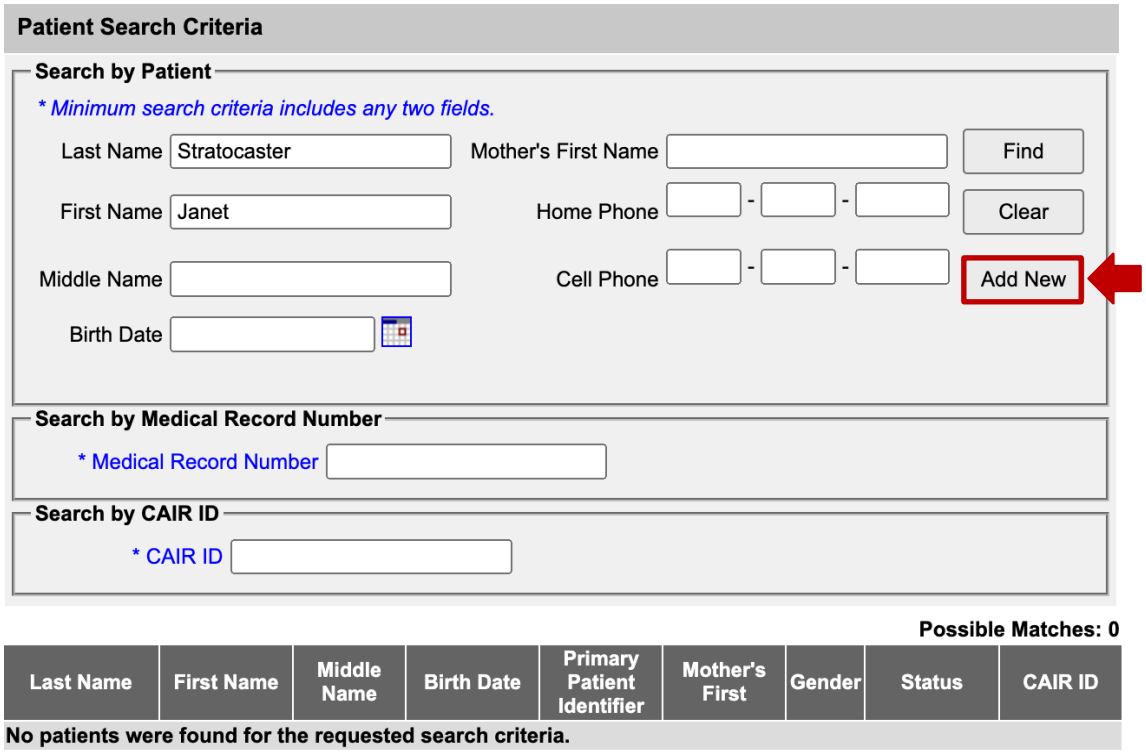
Section 13: Entering a New Patient

Before entering a new patient in CAIR2, it is very important that you search thoroughly first to make sure the patient does not already have a record in CAIR2 (see the Searching for Patients section). This will prevent creating a duplicate record. If you cannot find the patient in CAIR2, disclose the patient (see the Disclosure Process for Patients/Parents section), and then you can create the patient's record using the instructions below.

Note: If your site has an EHR/EMR, confirm with your site manager if your site is sending patient records/doses electronically to CAIR2. If you are, **do not** create new patients in CAIR2 because, in doing so, your site can result in creating duplicate patient records in CAIR2.

To enter a new patient in CAIR2:

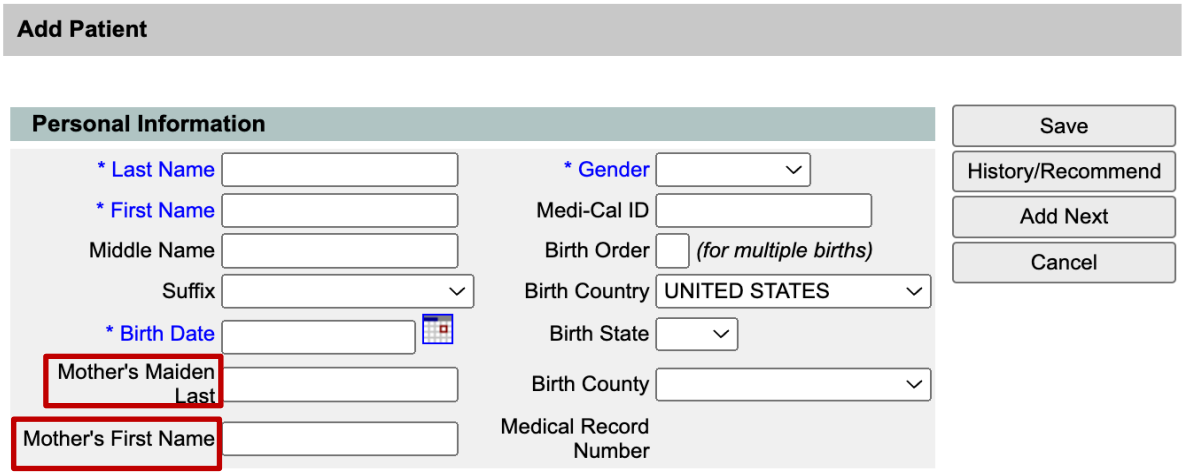
1. If you do not find the patient after searching at least 3 times on the 'Patient Search Criteria' screen, click the **Add New** button. **Note:** The 'Add New' button will only appear after a search attempt.



2. The 'Add Patient' screen will then display for you to enter the patient's information (see screenshot below).

3. Enter as much information as you can in the 'Personal Information' section of the screen.

   Note: Last Name, First Name, Birth Date, and Gender are required, but it's important to include as much information as possible (e.g., Mother's First Name) to help differentiate between patients with similar demographic information.



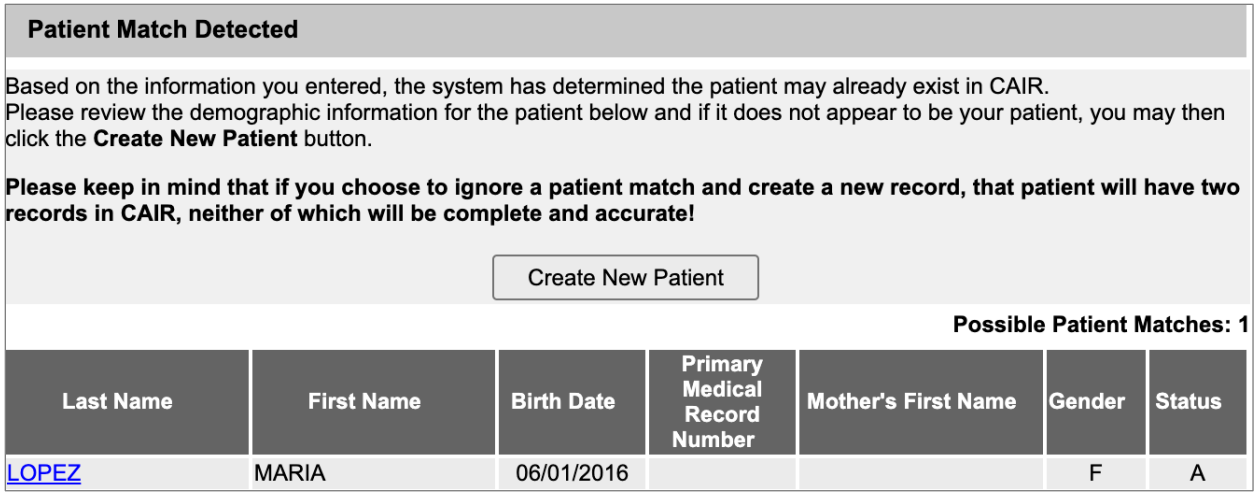
4. Click the **Save** button.
5. The system will automatically check again for possible matches using the information you entered. If no matches are found, a message will display at the top of the page informing you the patient's record was saved successfully.

   If the 'Mother's Maiden Last', 'Mother's First Name', and/or 'Race' and 'Ethnicity fields are not completed when you save the new patient, you will receive the following red text at the top of your screen:

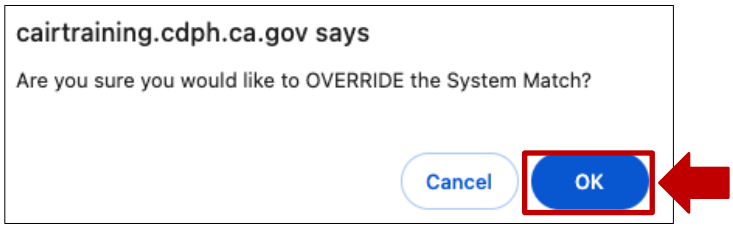
   > Mother's First Name and Maiden Last Name assist in the patient deduplication process. While the record was saved without this information, please attempt to locate and add it to the patient's record.
   > Race and Ethnicity are required values. While the record was saved without this information, please attempt to locate and add it to the patient's record.
   > Patient record successfully added

   The mother's maiden last name and first name are not required fields; however, these unique identifiers help to ensure duplicate records are not created. Leave the 'Mother's Maiden Last' field blank if you don't know the mother's maiden last name. **Do not add the mother's married last name in this field.**
6. Once the record is saved, add additional information about the patient on this screen, such as address, responsible persons, AKAs, Medical Record Number, etc. (see the Viewing/Editing Patient Information in CAIR2 section).

Note: If you receive a "Patient Match Detected" message when you first save the record (shown below), you must first verify the information before creating the new record.



1. Review the records listed in 'Possible Patient Matches'.
2. If an existing CAIR2 record that matches your patient's demographics is listed, view the possible match information by clicking on the blue hyperlink for the corresponding last name. You will be taken to the 'Update Patient' screen of the patient's record to verify the information.
3. If one of the existing CAIR2 records **matches** your patient, **do not** create a new record; instead, review and correct/update the patient's information in their existing CAIR2 record.
4. If you verify that the possible matches listed are not your patient, click the **Create New Patient** button to override the warning.
5. The following pop-up message will display to override the system. Click the **OK** button.



6. Then, follow the steps above to enter the new patient.

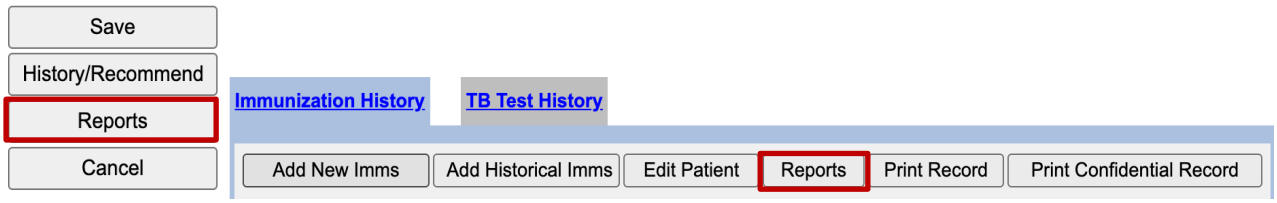
Section 14: Running Patient Reports

You may view, save, and/or print the following Patient Reports for the patient: Immunization History Report, Immunizations Needed/Routing Slip, Yellow Card Report, and Blue Card Report (schools only).

To view/print any of these reports:

1. Click the **Reports** button on either the 'Update Patient' or the 'History/Recommend' screen (see screenshots below).

Update Patient screen **History/Recommend screen**



The screen below will appear:

Reports Available for this Patient

Report	Description	Additional Information
Immunization History Report	Displays demographics, registry data, contact information, as well as detailed immunization history.	None
Immunizations Needed/Routing Slip	Displays demographics, contact information, immunization history, as well as immunizations needed.	None
Yellow Card Report	Prints the California Immunization Record (Yellow Card).	None
Blue Card Report	Prints the California School Immunization Record (Blue Card).	None

2. Click on the name of the report you want to view/print. It will display as an Adobe® PDF file.
3. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
4. To return to the 'Patient Reports' screen, you may close the Acrobat Reader® by clicking the **X** button in the upper right corner.

Examples of Patient Reports. See the following pages for examples of the:

- **Immunization History Report** – Provides more details about the vaccines the patient has received when compared to the Immunization Needed/Routing Slip and Yellow Card reports, such as the Mfg Code, Lot #, Body Route and Site, Shotgiver name and title, and VIS Date.
- **Immunizations Needed/Routing Slip** – Provides additional patient demographics, such as Race and Ethnicity, when compared to the Immunization History and Yellow Card reports. This report can be used during the patient's visit to document vaccines and TB tests they obtained during their visit.
- **Yellow Card Report** – This is the only report that provides Spanish translation. When compared to the Immunization History Report, the Yellow Card provides fewer details about the vaccines the patient has received. A copy of this report should be provided after the patient's visit (i.e., not to be used during the patient's visit like the Immunization Needed/Routing Slip). The report provides the patient's immunization record, their most recent TB test result(s), blank spaces to add additional doses, and vaccine definitions. **Note:** This report will only include the patient's 3 most recent Flu doses.

Immunization History Report

The Immunization History Report displays demographics, a detailed summary of the vaccines the patient has received, reactions, and comments. This report may be provided to the patient or parent/legal guardian if requested (e.g., if the patient/parent needs more detailed information than what is included in the Yellow Card Report). It can also be filed in the patient's chart.

9/24/24

Immunization History Report

CAIR Clinic 1

CAIR ID: **114464** Medical Record Number: Tracking Schedule: **ACIP**

Patient Name: **SUMMER BROWN**

Birth Date: **05/17/2003** Gender: **Female**

21 years, 4 months, 7 days

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	Shot Giver	VIS Date	React
HepB	05/17/2003	1 of 4	HepB-Peds [Engerix-B Peds ©]	Full					Transcribed by (CAIR Clinic 1)			
	06/17/2003	2 of 4	HepB-Peds [Engerix-B Peds ©]	Full					Transcribed by (CAIR Clinic 1)			
	08/18/2003	3 of 4	HepB-Peds [Engerix-B Peds ©]	Full					Transcribed by (CAIR Clinic 1)			
HPV	10/06/2016	1 of 2	HPV9 [Gardasil 9 ©]	Full	MSD	68FY12	IM	LD	CAIR Clinic 1	Carol Brown,NP	03/31/2016	
MenB	08/16/2019	1 of 2	MenB, OMV [BEXSERO ©]	Full	SKB	H5673	IM	LD	CAIR Clinic 1	Carol Brown,NP	08/06/2021	
Td/Tdap	10/30/2011	1 of 3	Tdap [Tdap > 7 years, NOS ©]	Full		ABC1234	IM	LD	CAIR Clinic 1	Donald Green,MD	08/06/2021,	

Reaction Descriptions:
No Records Found.

Patient Comments:	**Start Date:**	**End Date:**
History of varicella (chicken pox)	10/06/2016	

Primary Physician:

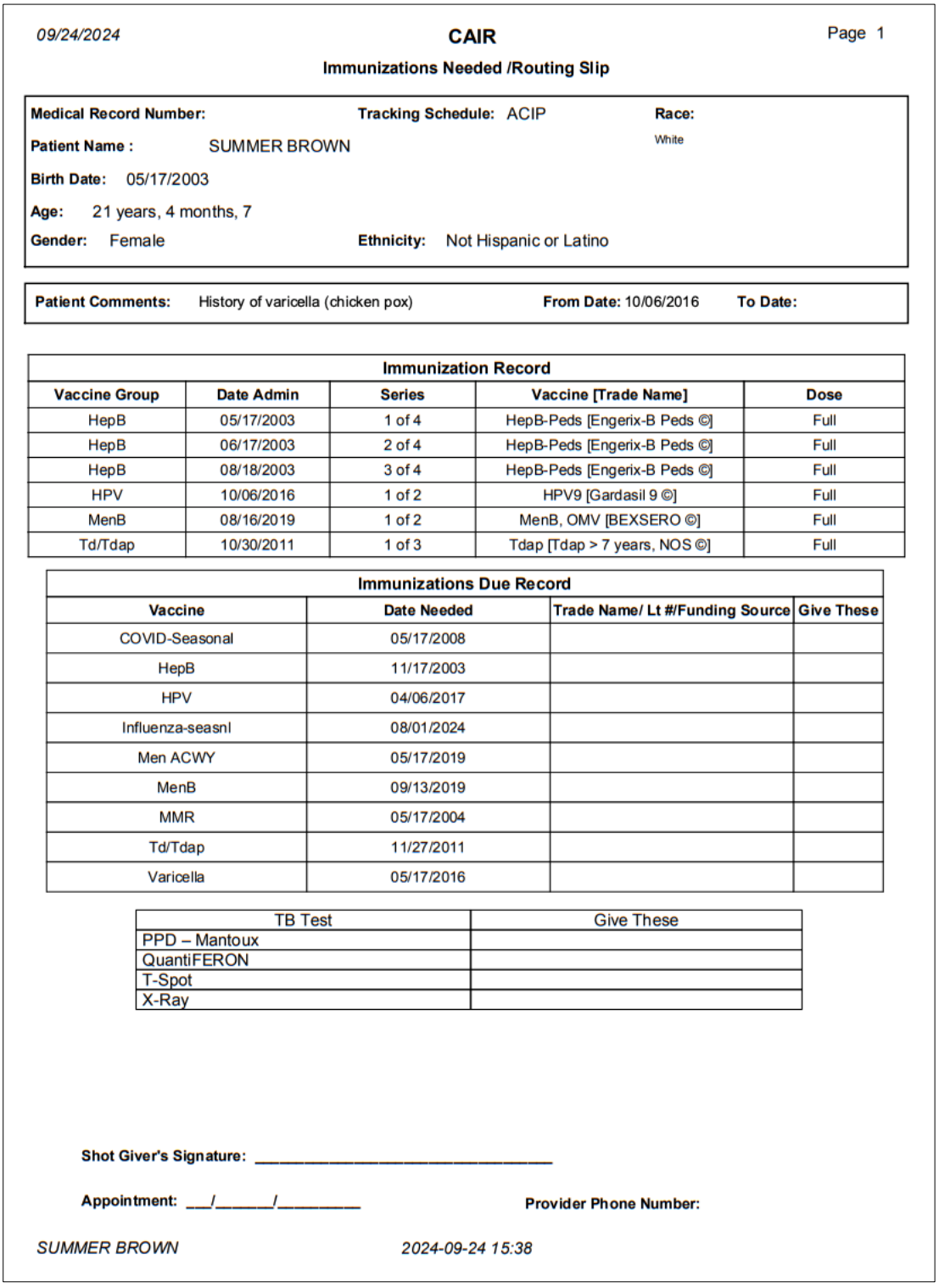
Address:

Physician's Signature

SUMMER BROWN **05/17/2003**

Immunizations Needed/Routing Slip Report

The Immunizations Needed/Routing Slip report displays patient demographics, comments, immunization history, and immunizations recommended by date according to the tracking schedule assigned to the patient. Clinic staff can pull this report before the visit to determine which vaccines the patient should receive and use it as an internal document to record the doses administered to the patient. They can then be entered into CAIR2 for the patient by clinic staff. This report can also be provided to parents and guardians at the end of the visit for their records and to help identify upcoming immunizations for their children.



09/24/2024 **CAIR** Page 1

Immunizations Needed /Routing Slip

Medical Record Number: **Tracking Schedule:** ACIP **Race:** White

Patient Name : SUMMER BROWN

Birth Date: 05/17/2003

Age: 21 years, 4 months, 7

Gender: Female **Ethnicity:** Not Hispanic or Latino

Patient Comments: History of varicella (chicken pox) **From Date:** 10/06/2016 **To Date:**

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose
HepB	05/17/2003	1 of 4	HepB-Peds [Engerix-B Peds ©]	Full
HepB	06/17/2003	2 of 4	HepB-Peds [Engerix-B Peds ©]	Full
HepB	08/18/2003	3 of 4	HepB-Peds [Engerix-B Peds ©]	Full
HPV	10/06/2016	1 of 2	HPV9 [Gardasil 9 ©]	Full
MenB	08/16/2019	1 of 2	MenB, OMV [BEXSERO ©]	Full
Td/Tdap	10/30/2011	1 of 3	Tdap [Tdap > 7 years, NOS ©]	Full

Immunizations Due Record

Vaccine	Date Needed	Trade Name/ Lt #/Funding Source	Give These
COVID-Seasonal	05/17/2008		
HepB	11/17/2003		
HPV	04/06/2017		
Influenza-seasnl	08/01/2024		
Men ACWY	05/17/2019		
MenB	09/13/2019		
MMR	05/17/2004		
Td/Tdap	11/27/2011		
Varicella	05/17/2016		

TB Test	Give These
PPD – Mantoux	
QuantiFERON	
T-Spot	
X-Ray	

Shot Giver's Signature: _____

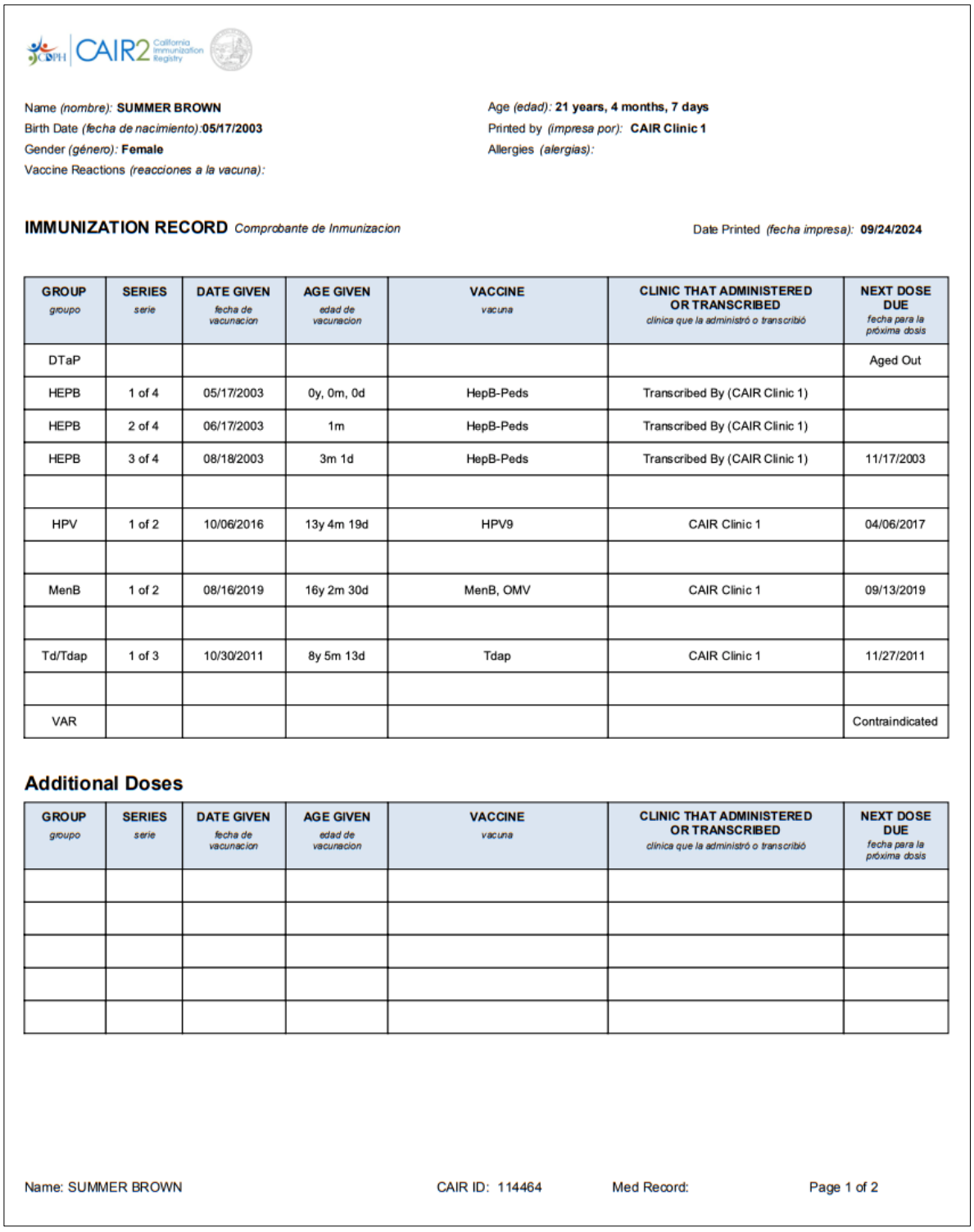
Appointment: ___/_____/_____ **Provider Phone Number:**

SUMMER BROWN *2024-09-24 15:38*

Yellow Card Report

The Yellow Card Report is the immunization record for patients/parents. Providers are required to update and add patient information, including vaccines, that were administered at the visit in CAIR2. Then, a copy of this report should be given to the patient/parent/guardian at the end of the visit. If TB/TB-related X-rays have been performed and entered manually into CAIR2, this information will also display on this report.

Note: Providers can use the 'Additional Doses' section to hand-write doses to document that a patient received a dose. However, it is a requirement to add this information to patient records in CAIR2.



CAIR2 California Immunization Registry

Name *(nombre)*: **SUMMER BROWN**
Birth Date *(fecha de nacimiento)*:**05/17/2003**
Gender *(género)*: **Female**
Vaccine Reactions *(reacciones a la vacuna)*:

Age *(edad)*: **21 years, 4 months, 7 days**
Printed by *(impresa por)*: **CAIR Clinic 1**
Allergies *(alergias)*:

IMMUNIZATION RECORD *Comprobante de Inmunizacion*

Date Printed *(fecha impresa)*: **09/24/2024**

GROUP *groupo*	SERIES *serie*	DATE GIVEN *fecha de vacunacion*	AGE GIVEN *edad de vacunacion*	VACCINE *vacuna*	CLINIC THAT ADMINISTERED OR TRANSCRIBED *clinica que la administró o transcribió*	NEXT DOSE DUE *fecha para la próxima dosis*
DTaP						Aged Out
HEPB	1 of 4	05/17/2003	0y, 0m, 0d	HepB-Peds	Transcribed By (CAIR Clinic 1)	
HEPB	2 of 4	06/17/2003	1m	HepB-Peds	Transcribed By (CAIR Clinic 1)	
HEPB	3 of 4	08/18/2003	3m 1d	HepB-Peds	Transcribed By (CAIR Clinic 1)	11/17/2003
HPV	1 of 2	10/06/2016	13y 4m 19d	HPV9	CAIR Clinic 1	04/06/2017
MenB	1 of 2	08/16/2019	16y 2m 30d	MenB, OMV	CAIR Clinic 1	09/13/2019
Td/Tdap	1 of 3	10/30/2011	8y 5m 13d	Tdap	CAIR Clinic 1	11/27/2011
VAR						Contraindicated

Additional Doses

GROUP *groupo*	SERIES *serie*	DATE GIVEN *fecha de vacunacion*	AGE GIVEN *edad de vacunacion*	VACCINE *vacuna*	CLINIC THAT ADMINISTERED OR TRANSCRIBED *clinica que la administró o transcribió*	NEXT DOSE DUE *fecha para la próxima dosis*

Name: SUMMER BROWN CAIR ID: 114464 Med Record: Page 1 of 2

TB

TB TESTS/RISK ASSESSMENT *pruebas de TB/evaluación de riesgos*	DATE GIVEN/ COLLECTED *fecha de administración/datos recopilados*	PPD or IGRA Minus Nil Result Component 1 (mm or IU/mL or Spots) *PPD o IGRA menos Nil resultado 1*	IGRA Minus Nil Result Component 2 (IU/mL or Spots) *IGRA menos Nil resultado 2*	INTERPRETATION *interpretación*	CLINIC THAT ADMINISTERED OR TRANSCRIBED *clínica que la administró o transcribió*
PPD-Mantoux	06/12/2013	0 mm		Negative	Transcribed in CAIR

Parents: Your child must meet California's immunization requirements to be enrolled in school and child care. Keep this Record as proof of immunization.

Definitions:
COVID-19: *coronavirus*
Covid Seasonal: *coronavirus seasonal*
DTaP, DT, Tdap: *diphtheria, tetanus, pertussis (whooping cough)*
Flu: *influenza (only past 3 years listed)*
HepA: *hepatitis A*
HepB: *hepatitis B*
Hib: *haemophilus influenza B (hib meningitis)*
HPV: *human papillomavirus*
HZV, RZV, ZVL: *herpes zoster (shingles)*
IPV, OPV: *polio*
MenACWY (MPSV4) (MCV4): *meningococcal conjugate*
MenB: *meningococcal B*
MMR: *measles, mumps, rubella*
Orthopox: *smallpox, cowpox, monkeypox*
PCV, PPSV: *pneumococcal (pneumonia)*
Rota, RV: *rotavirus*
RSV: *respiratory syncytial virus*
Td/Tdap: *tetanus*
VAR: *varicella (chickenpox)*
YF: *yellow fever*

Invalid means that a dose was not given according to the medical schedule. But, the dose may still meet school requirements.

Complete or Aged out means that the next dose is not medically needed.

Transcribed by indicates that the clinic entered the information to CAIR but did not administer that dose.

Padres: Su niño(a) debe cumplir con los requisitos de vacunación de California para poder inscribirse en la escuela y la guardería. Mantenga este comprobante como prueba de vacunación.

Definición:
COVID-19: *coronavirus*
Covid Seasonal: *coronavirus estacional*
DTaP, DT, Tdap: *difteria, tétanos y tos ferina*
Flu: *influenza (sólo se anotan los últimos 3 años)*
HepA: *hepatitis A*
HepB: *hepatitis B influenza B*
Hib: *haemophilus*
HPV: *virus del papiloma humano*
HZV, RZV, ZVL: *herpes zóster (culebrilla)*
IPV, OPV: *polio*
MenACWY (MPSV4) (MCV4): *vacuna antimeningocócica conjugada*
MenB: *Vacuna contra el meningococo B*
MMR: *sarampión, paperas y rubéola (sarampión alemán)*
Orthopox: *viruela, viruela bovina, viruela símica*
PCV, PPSV: *neumocócica*
Rota, RV: *rotavirus*
RSV: *virus respiratorio sincitial*
Td/Tdap: *tétanos*
VZV or VAR: *varicela*
YF: *fiebre amarilla*

Invalid significa que no se administró una dosis de acuerdo con el programa médico. Pero, la dosis aún puede cumplir con los requisitos escolares.

Complete or Aged Out significa que la siguiente dosis no es médicamente necesaria.

Transcribed by significa que la clínica ingresó esa información en CAIR pero no administró esa dosis.

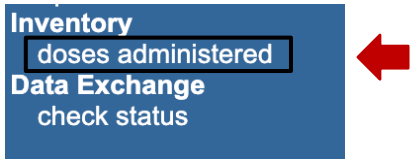
Section 15: Running the Doses Administered Report

The Doses Administered Report shows the number of administered doses (not historical doses) given by your site. You can narrow the report down by selecting a specific Funding Source and/or Date Range. The report will show the number of doses given, the number of patients that received those doses, and a list of each patient that received the doses.

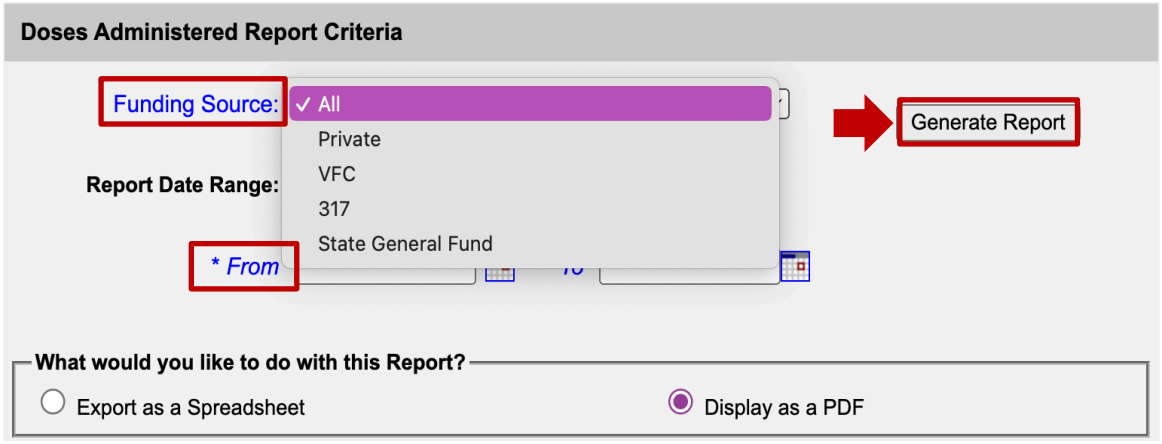
Note: If the report fails to generate or you get an error message, it means the report was too large to run. In this case, you should shorten the 'Date Range' (e.g., run multiple reports one month at a time instead of several months at a time).

To generate a Doses Administered report:

1. Click the **doses administered** link in the left blue menu panel under the 'Inventory' header.



2. Enter/select the following information in the 'Doses Administered Report Criteria' screen:



- **Funding Source:** You can select to view all vaccines or vaccines from a specific Funding Source (e.g., Private, VFC, 317, or State General Fund). Click on the desired funding source in the dropdown or leave it as 'All' to see all Funding Sources used.
- **Report Date Range: From/To:** Enter/select a date using the MM/DD/YYYY format to view doses given within the date range you enter.
- **What would you like to do with this Report?:** You can generate the report as an Excel spreadsheet or a PDF document.

3. Click the **Generate Report** button to generate the report.
4. Once generated, the report will display in another window as either a PDF or Excel spreadsheet, depending upon the radio button you clicked in the 'Doses Administered Report Criteria' screen.

See below for an example and explanation of the information contained in a Doses Administered Report.

Example of a Doses Administered Report (PDF)

Date Report Generated: 11/15/2023
Report Title: Doses Administered
Filters: CAIR Clinic 14
Detail of Summary: Detail
Date Range: 11/15/2023 to 11/15/2023
Funding Source: All

Doses Administered (Summary)

Vaccine	Age Groups (Years)				Total Number of Doses	Total Number of Patients
	<1	1 to 6	7 to 18	19+		
DTaP-HepB-IPV	0	1	0	0	1	1
Flu quadrivalent injectable	0	1	0	0	1	1
MMRV	0	1	0	0	1	1
PCV13	0	1	0	0	1	1

				Total Doses
0	4	0	0	4

				Total Unique Patients
0	1	0	0	1

Doses Administered (Detail)

Administered Date	Vaccine Group	CAIR ID	Patient Name	DOB	Administered By	Lot#	Expiration Date	Trade Name	Funding Source	Patient Eligibility
11/15/2023	DTaP-HepB-IPV	407828	Georgina Morales	06/01/2019	Michelle Adams, RN	YT6574	12/31/2025	Pediarix	VFC	V02 - VFC Eligible Medi-Cal/CHDP
11/15/2023	Flu quadrivalent injectable	407828	Georgina Morales	06/01/2019	Michelle Adams, RN	H374K	06/30/2025	Fluzone Quad MDV	VFC	V02 - VFC Eligible Medi-Cal/CHDP
11/15/2023	MMRV	407828	Georgina Morales	06/01/2019	Michelle Adams, RN	020104	12/31/2025	Proquad	VFC	V02 - VFC Eligible Medi-Cal/CHDP
11/15/2023	PCV13	407828	Georgina Morales	06/01/2019	Michelle Adams, RN	PL0210	12/31/2025	Prevnar13	VFC	V02 - VFC Eligible Medi-Cal/CHDP

- **Report Criteria section:** The grey section at the top shows the criteria used to generate the report.
- **Doses Administered (Summary):** This section displays a summary of the number of doses given, sorted in several different ways: By Vaccine(s) given, Age Groups, Total Number of Doses, and Total Number of Patients who received those doses, Total Doses, and Total Unique Patients who received those doses.
    - **Vaccine:** This shows the name of the vaccine in abbreviated form. Only vaccines that were given during the date range entered will display.
    - **Age Groups (Years) columns:** This shows the number of doses given of each vaccine within the specified age group.
    - **Total Number of Doses:** This shows the total number of doses given of each vaccine for all age groups.

      Note: A patient will be counted more than once if they received more than one dose of that vaccine within the entered date range.
    - **Total Number of Patients:** This shows the total number of patients who received that vaccine.
    - **Total Doses:** This shows the total number of doses given during the date range.

      Note: A patient will be counted more than once if they received more than one dose of that vaccine within the entered date range.
    - **Total Unique Patients:** This shows the total number of unique patients that received doses within the date range (i.e., each patient is counted only once, regardless of how many doses they received).

- **Doses Administered (Detail):** This section displays dose information for each patient that received an administered dose of vaccine from your site during the date range entered. **Note:** A patient may display more than once in this section if they received multiple vaccines during the date range entered. The information for each patient includes:
  - **Administered Date:** The date the vaccine was administered to the patient.
  - **Vaccine Group:** The vaccine the patient received.
  - **CAIR ID:** The patient's unique CAIR2 ID number.
  - **Patient Name:** The First and Last Name of the patient.
  - **DOB:** The patient's Date of Birth.
  - **Administered By:** The name and title of the Shotgiver who administered the vaccine to the patient.
  - **Lot#:** The Lot Number for the vaccine the patient received.
  - **Expiration Date:** The expiration date of the vaccine the patient received.
  - **Trade Name:** The trade name of the vaccine the patient received.
  - **Funding Source:** The Funding Source of the vaccine the patient received (e.g., VFC, Private, State General Fund, 317).
  - **Patient Eligibility:** The patient's documented eligibility for the vaccine (e.g., VFC- Medi-Cal/CHDP, VFC-Uninsured, etc.; 317; State General Fund; Private).

Note: The information displayed in each column will be impacted depending on which of the four methods your site uses to enter/submit doses to CAIR2 (see below).

- **Sites <u>Manually</u> entering doses into CAIR2 and <u>Using</u> the CAIR2 Inventory Feature:** If your site directly enters doses into CAIR2 and uses the CAIR2 Inventory feature, **all columns** in the report for each dose will be filled in for each patient.
- **Sites <u>Manually</u> entering doses into CAIR2 but <u>NOT Using</u> the CAIR2 Inventory Feature:** All fields in the report for each dose will be filled in, except for the following:
  - **Lot#:** The Lot Number will be filled in **only** if the user at your site entered the Lot Number manually when recording the dose in CAIR2.
  - **Expiration Date:** The Lot Expiration Date will always be blank.
- **Sites <u>Submitting Doses</u> Directly to CAIR2 from their <u>EHR/EMR</u> Via CAIR2 Data Exchange (DX) and <u>Using</u> the CAIR2 Inventory Decrementing Feature:** All fields in the report for each dose will be filled in, except for the following:
  - **Funding Source:** If the provider doesn't include the Patient Eligibility information in their DX file, this field will be blank.
  - **Patient Eligibility:** This field will be blank if the provider doesn't send this information.
- **Sites <u>Submitting Doses</u> Directly to CAIR2 from their <u>EHR/EMR</u> Via CAIR2 Data Exchange (DX) but <u>NOT Using</u> the CAIR2 Inventory Decrementing Feature:** All fields in the report for each dose will be filled in, except for the following:
  - **Expiration Date:** This field will always be blank.

- **Trade Name:** If the dose was sent using a CVX code (not an NDC code) that **does not** have a 1 to 1 relationship (e.g., CVX 150 could = Flumist, Afluria, Fluarix, or Flulaval), the Trade Name field will be blank. **Note:** If the CVX code **has** a 1 to 1 relationship (e.g., CVX 165 = Gardasil 9) the Trade Name will display in the report for the dose.
- **Funding Source:** If the provider doesn't send the Patient Eligibility, this field will be blank.
- **Patient Eligibility:** This field will be blank if the provider doesn't send this information.

Note: Information in the 'Administered By' column for each dose will display in the Doses Administered report for DX sites if the Shotgiver information is submitted to CAIR2 in the VXU (RXA-10) segment fields. The Shotgiver information is required for administered vaccines, but if the information is missing, the dose(s) will still be recorded in the patient's record in CAIR2. CAIR2 also identifies vaccine information that was sent with errors, and correct information should be resubmitted. If you need assistance or have any questions, contact the CAIR Data Exchange Team at cairdataexchange@cdph.ca.gov. For more information about how to check error messages between your EHR/EMR and CAIR2, refer to the Data Exchange Check Status Guide.