CAIR2 California Immunization Registry

Guide to Using the Manage Patient Status Feature in CAIR2

Revised: 05/12/2023

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
CAIR Website: (cdph.ca.gov/cair)

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Section 1: Introduction to the Manage Patient Status Feature

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

To assist the review process, your patients can be grouped using various criteria, including current active/inactive status, age, time since they last received an immunization from your site, patient last name, or any combination of these criteria.

The six patient statuses available in CAIR2 are:
- Active
- Inactive-Lost to follow-up
- Inactive-No longer a patient
- Inactive-Permanently (Deceased)
- Inactive-Unspecified
- Unknown

Note: 'Inactive-Permanently (Deceased)' and 'Unknown' can only be selected within an individual patient record, not through the Manage Patient Status feature (see Changing the Status in an Individual Patient's Record section).

Using the Manage Patient Status feature to inactivate patients no longer active in your practice removes them from your CAIR2 immunization coverage reports and reminder/recall reports, making these reports more accurate and, therefore,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

Section 2: Recommendations for Inactivating Patients

Your site should establish internal policies for determining when to inactivate a patient from your site in CAIR2 and when to leave a patient as 'Active'. Your site may want to consider having different criteria for different age groups. For example, adolescents and adults may not be due for shots for longer periods of time (e.g., annually) as opposed to young children, who may be due every few months. In these cases, you may want to keep adolescents/adults active in CAIR2 for your site for longer periods of time, even if they have not received a vaccination recently.
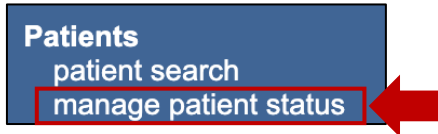
In addition, your site should also establish an internal policy on when to use a specific status – for example, when to designate a patient as 'Inactive-No longer a patient' versus 'Inactive-Lost to follow-up'.

Important Note: We encourage you to review each patient in the list generated before inactivating the entire group, in case some patients should still be considered active even though they may not have recently been into your practice for a vaccination.
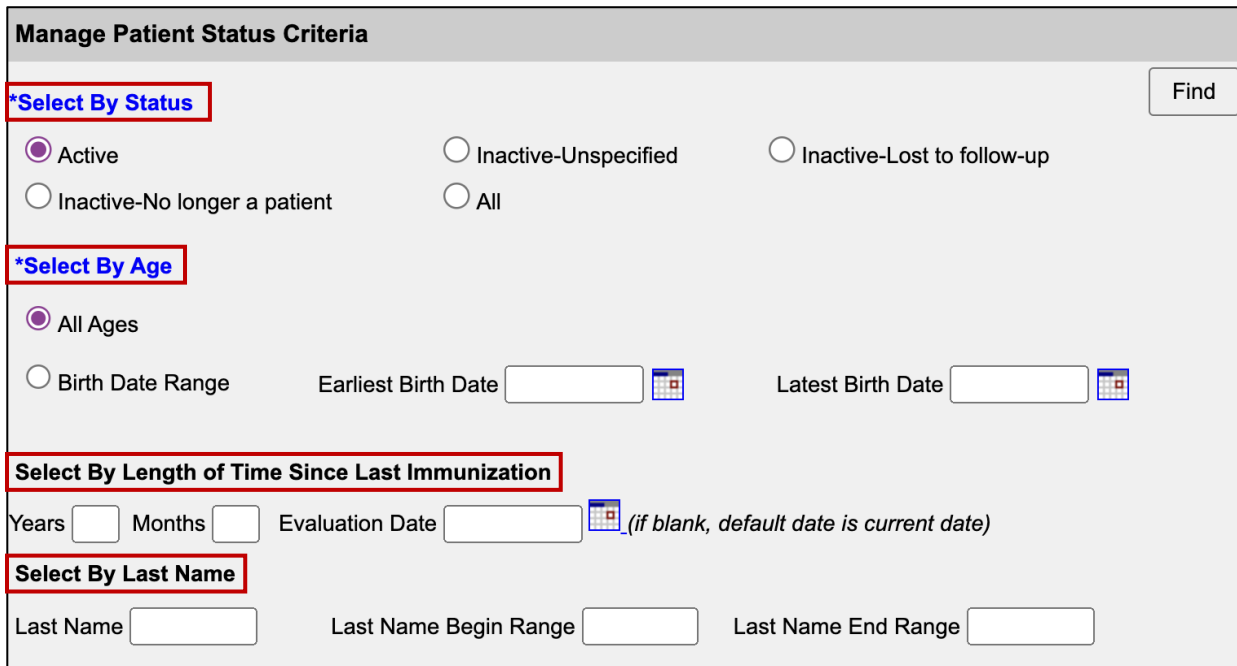
Section 3: Accessing the Manage Patient Status Feature

To access the Manage Patient Status feature:

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

Patients
patient search
manage patient status

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

Manage Patient Status Criteria

		Find

*Select By Status

○ Active   ○ Inactive-Unspecified   ○ Inactive-Lost to follow-up

○ Inactive-No longer a patient   ○ All

*Select By Age

○ All Ages

○ Birth Date Range   Earliest Birth Date [   ]   Latest Birth Date [   ]

Select By Length of Time Since Last Immunization

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

Select By Last Name

Last Name [   ]   Last Name Begin Range [   ]   Last Name End Range [   ]

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

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

Note: A combination of criteria can be used to generate a group of patients, depending on how large or small you want the group to be. This is helpful if you want to work in smaller batches rather than all patients simultaneously. You can choose a status, an age range, a length of time since last immunized, and/or a last name range in any combination.

Section 4: Generating a Group of Patients by Status

To generate a group of patients by their current Status with your site:

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

3. At the bottom of the screen, you will see a group of all patients with the status you selected listed alphabetically by last name. For example, if you selected 'Active', the list will contain all patients in CAIR2 that currently have an 'Active' status with your site.

The screen contains:

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

See Changing the Status of One or Multiple Patients section of this guide for instructions on how to change the status of patients on this screen.

Section 5: Generating a Group of Patients by Birth Date Range

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

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

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

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

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

Section 6: Generating a Group of Patients by Length of Time Since Last Immunization

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

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

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

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

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

See Changing the Status of One or Multiple Patients section of this guide for instructions on how to change the status of patients on this screen.

Section 7: Generating a Group of Patients by Last Name

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

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

To generate a list of all patients associated with your site by a Last Name range:

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

Example 1: Based on the criteria entered below, the group that will display will include patients currently listed as 'Active' for the site, of 'All Ages', with the last name 'Jones'.

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

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

New Status Value [⌄] [Save] [Cancel]

Patient Status Result Set Returned 1-2 of 2

Page Select/Deselect ☐All	Last Name	First Name	Birth Date	CAIR ID	Current Status
☐	JONES	JACK	01/01/2014	6423878	ACTIVE
☐	JONES	JEN	01/02/2014	6423879	ACTIVE

Example 3: Entering **AA** in the 'Last Name Begin Range' and **AZ** in the 'Last Name End Range' will generate a group of all patients with a last name that begins with the letter 'A'.

Select By Last Name			
Last Name	Last Name Begin Range AA	Last Name End Range AZ	

New Status Value [⌄] [Save] [Cancel]

Patient Status Result Set Returned 1-3 of 3

Page Select/Deselect ☐All	Last Name	First Name	Birth Date	CAIR ID	Current Status
☐	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
☐	ALMOND	JOY	06/01/2000	6423884	ACTIVE
☐	AZAIR	HELEN	06/01/2015	6423885	ACTIVE

See **Changing the Status of One or Multiple Patients** section of this guide for instructions on how to change the status of patients on this screen.

Section 8: Changing the Status of One or Multiple Patients

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

Note: If there are less than 100 patients in your group, they will all display on the same screen, and you will see a red message indicating the number of patients in your group.

New Status Value [⌄] [Save] [Cancel]

Patient Status Result Set Returned 1-16 of 16

Page Select/Deselect ☐All	Last Name	First Name	Birth Date	CAIR ID	Current Status
☐	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
☐	ALMOND	JOY	06/01/2000	6423884	ACTIVE
☐	AZAIR	HELEN	06/01/2015	6423885	ACTIVE
☐	CASTRO	JAMIE	04/12/2002	6423471	ACTIVE
☐	DANNA	ANNA	04/12/2002	5306038	ACTIVE

Important Note: If there are more than 100 patients in your group, they will appear on multiple pages. You must work on each page before moving to the next page. You must change the status and click **Save** for the patients on that page. You have to click **Next** to go to the next page to view more patients and repeat the process. You can also return to a previous page by clicking **Previous** (see screenshot below).

New Status Value					Save	Cancel

Patient Status Result Set Returned 101-200 of 399 «Previous Next»

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

After you have reviewed all of the patients on the screen:

1. Choose the **New Status Value** you want to change these patients to by using the 'New Status Value' dropdown. **Reminder:** If you need to select either the 'Inactive-Permanently (Deceased)' or 'Unknown' status option for a patient, you can **only** select these within an individual patient record (see Changing the Status in an Individual Patient's Record section).

New Status Value				Save	Cancel

Patient Status Re	✓				
Page Select/D	Inactive-Lost to follow-up				
☐ All	Inactive-No longer a patient	me	Birth Date	CAIR ID	Current Status
☐	Inactive-Unspecified				
☐	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE

2. Select which patients you want to change to the new status; you have two options:

   a) If you want to change the status of **all** patients on the current page you are viewing to the new status, select the **All** checkbox and then click the **Save** button.

New Status Value	Inactive-No longer a patient ✓			Save	Cancel

Patient Status Result Set Returned 1-16 of 16

Page Select/Deselect ✓ All	Last Name	First Name	Birth Date	CAIR ID	Current Status
✓	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
✓	ALMOND	JOY	06/01/2000	6423884	ACTIVE
✓	AZAIR	HELEN	06/01/2015	6423885	ACTIVE
✓	CASTRO	JAMIE	04/12/2002	6423471	ACTIVE
✓	DANNA	ANNA	04/12/2002	5306038	ACTIVE

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

New Status Value	Inactive-No longer a patient ⌄				Save	Cancel

Patient Status Result Set Returned 1-16 of 16

Page Select/Deselect ☐All	Last Name	First Name	Birth Date	CAIR ID	Current Status
☑	AARONS	MICHEAL	01/02/2000	6423883	ACTIVE
☐	ALMOND	JOY	06/01/2000	6423884	ACTIVE
☑	AZAIR	HELEN	06/01/2015	6423885	ACTIVE
☐	CASTRO	JAMIE	04/12/2002	6423471	ACTIVE

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

> cairtraining.cdph.ca.gov says
>
> Count of patients selected for status update to 'Inactive-No longer a patient' = 2. Are you sure you want to update these patients status values? Press 'OK' to update; otherwise, press 'Cancel'.
>
> Cancel   OK

4. Once you click the **OK** button, these patients will be listed with your site's new status.

Reminder: If you have more than 100 patients in your list, click the **Next** hyperlink to see the next batch of patients in your group. Repeat the steps above until you have completed the group.

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

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

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

To change a patient's status within their CAIR2 record (see screenshot below):

1. Log into CAIR2, search for the patient, and open the patient's record (see the CAIR2 Regular User Guide found on the [CAIR2 User Guides Page](#) for more information).
2. On the 'Update Patient' screen that displays, click on the **Organization Information** tab and update the patient's status in the **Status** dropdown.

3. Click the **Save** button in the upper right-hand corner.