CAIR2 Account Update Instructions

CAIR2 Account Update can be accessed at [http://accountupdate.cairweb.org/](http://accountupdate.cairweb.org/)

Only authorized staff (i.e., supervisors and/or administrators) at the organization site should be doing Account Updates, not individual users. Sites should identify one or two staff members to be responsible for submitting updates.

The CAIR2 Account Update website allows you to modify your Org/Site and User info in the following web page order. Please review the Best CAIR2 User Roles for Your Org/Site guidance before adding users. Click the topic area below to walk through each process.

- **Update Org/Site Info**
- **Update User Roles or Inactivate Existing Users**
- **Re-Activate Users**
- **Transfer Users or Expand Their Access to Other CAIR Accounts**
- **Add New Users**
- **Update Existing ShotGivers**
- **Add New ShotGivers**

Note: Clicking the **DO NOT** link on each page allows you to skip that page and move to the next.

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

In most cases, the only user role your practice will need is the ‘DX Quality Assurance (DX QA)’ user role which allows a staff member to login to CAIR2 and monitor data exchange transactions using the 'Check Status' screen as well as to lookup patients if needed and also to run various aggregate patients reports, including reminder/recall. The 'DX QA' role requires no formal training and your staff gets immediate login access to CAIR2 upon approval of the account request.

Only if your site plans to use CAIR2 to manage vaccine inventory ('Power' role) or needs to correct or enter historical doses or Tb test results ('Regular' role) would you need other CAIR2 user roles. See the CAIR2 User Roles document for what each user role can do.
Update Org/Site Info

1. To log in, enter your Organization Code and Zip code and click on the Sign On button.

2. The Update CAIR Org/Site Information screen will display (right).

3. At minimum, add your Name and confirm the Contact Email Address and their Phone Number.

4. Make any other edits to the Org/Site Information page as needed, then click the Continue button at the bottom of the page to move forward.

5. The Org/Site Update verification page displays next. If your Org/Site’s address cannot be validated, a red message will appear. Click the Back button to correct your address if this happens. However, you can move forward without correcting the address by clicking the Continue button at the bottom of the page.
6. If you have no user edits to make, click the DO NOT link on each subsequent page until you get to the Org Agreement page (at right).

7. Complete the required fields on this page then click the Submit My Org and User Account Information button at the bottom of the page to complete your Org Account update.

8. The Organization Representative as listed on the Org Agreement will get a confirmation email that the update has been successfully submitted.
9. Follow Steps 1-5 above.

10. The **Update Existing CAIR User Account** page opens, showing the first 30 existing users. To see other users, click the **Continue** button at the bottom of the page.

11. Changes to existing user roles, email addresses, or user inactivation are the only changes that can be requested on this page. Make any changes, and click the **Continue** button at the bottom of the page to proceed.

12. If you plan to make other changes, click the **DO NOT** link on the following pages to move you forward to your next desired update page. If these are the only changes you wish to make, keep clicking the **DO NOT** link on each following page until you get to the **Org Agreement** page.

13. Complete the required fields on this page, then click the **Submit My Organization and User Account Information** button at the bottom of the page to complete your update.
**Re-Activate Users**

14. Follow Steps 1-5 above.

15. When the Update Existing CAIR User Account page opens, click on the **DO NOT** link to get to the Re-Activate User page.

16. Enter the first and last user names and click the **Search** button to find each inactive user and complete the required information and indicated steps to reactivate them.

17. When finished, click the **Continue** button.

18. If you plan to make other changes, clicking the **DO NOT** link on each page to move forward until you find the update page you desire. If reactivating users is the only change you wish to make, continue clicking the **DO NOT** link on each page until you get to the **Org Agreement** page.

19. Complete the required fields on this page, then click the **Submit My Organization and User Account Information** button at the bottom of the page to complete your update.
Transfer Users or Expand Their Access to Other CAIR Accounts

If you know that a person used CAIR at another site, use the CAIR User Transfer/Additional Access page for the following tasks:

- Transfer an existing user from one site to another site
- Add an existing user to a site in addition to their current site

20. To begin, follow Steps 1-5 above.

21. When the Update Existing CAIR User Account page opens, click on the DO NOT link until you get to the CAIR User Transfer/Additional Access page.

22. Use this page to request a user be transferred to another CAIR account or request a user be able to access to more than one account. Up to 5 users can be included in your request.

23. Click the Continue button when you are finished requesting transfers/additional access.

24. If you plan to make other changes, click the DO NOT link on each page to move forward until you find the update page you desire. If transferring users is the only change you wish to make, continue clicking the DO NOT link on each page until you get to the Org Agreement page.

25. Complete the required fields on this page, then click the Submit My Organization and User Account Information button at the bottom of the page to complete your update.
Add New Users

26. Follow Steps 1-5 above.

27. When the Update Existing CAIR User Account page opens, click on the DO NOT link until you get to the New CAIR User Account page.

28. Complete the required fields on the page. Use the Add Additional User button to add additional user fields. Up to 10 new users can be added at one time.

29. When you have completed adding your new users, click the Continue button to move forward.

30. If you plan to make additional changes, click the DO NOT link on each page to move forward until you find the update page you desire. For example, many new users may be ShotGivers so you would need to enter them also as ShotGivers on the Add New ShotGivers page. If adding new users is the last update you wish to make, continue clicking the DO NOT link on each following page until you get to the Org Agreement page.

31. Complete the required fields on this page, then click the Submit My Organization and User Account Information button at the bottom of the page to complete your update.
**Update Existing ShotGivers**

Shotgivers are staff members who give shots or administer vaccines to patients. Shotgivers’ names will appear in the 'Administered By' drop-down list in CAIR2 for your site.

32. To begin, follow Steps 1-5 above.

33. When the **Update Existing CAIR User Account** page opens, click on the **DO NOT** link until you get to the **Update Existing ShotGiver Info** page.

34. Only changes to the ShotGiver title are possible on this page.

35. When you have completed your update process, click the **Continue** button to move forward.

36. If you plan to make additional updates, click the **DO NOT** link on each page to move forward until you find the update page you desire. If adding new users is the last change you wish to make, continue clicking the **DO NOT** link on each following page until you get to the **Org Agreement** page.

37. Complete the required fields on this page, then click the **Submit My Organization and User Account Information** button at the bottom of the page to complete your update.
**Add New ShotGivers**

Shotgivers are staff members who give shots or administer vaccines to patients. Shotgivers’ names will appear in the ‘Administered By’ drop-down list in CAIR2 for your site.

*PLEASE NOTE:* Adding a shotgiver in Account Update will not give them access to CAIR2 and allow them to log in as a user. If you need the shotgiver to be added as a CAIR2 user, please go back and add them on the Add New CAIR User Account page.

38. Follow Steps 1-5 above.

39. When the **Update Existing CAIR User Account** page opens, click on the **DO NOT** link until you get to the **Add New ShotGiver** page.

40. Add the clinicians from your practice who will administering vaccines. Adding them as ShotGivers will assure that their names appear in the ‘Administered By’ drop down list in CAIR2. Note: that ShotGivers must also be added as CAIR2 users in order to login to CAIR2.

41. When you have added your new ShotGivers, click the **Continue** button to move forward to the **Org Agreement** page.

42. Complete the required fields on this page, then click the **Submit My Organization and User Account Information** button at the bottom of the page to complete your update.