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Chapter 1 Introduction

In this chapter:

The California Immunization Registry
CAIR Mission Statement
The California Immunization Registry (CAIR)
The CAIR is a lifespan, population-based web application containing consolidated immunization records for nearly all Californians. CAIR is able to perform a variety of functions for health care providers, including:

- Recording immunizations, contraindications, and reactions
- Validating immunization history and providing immunization forecasts for shots due and past due
- Producing recall and reminder notices, vaccine usage and patient reports
- Managing vaccine inventory

CAIR Vision, Mission and Goals

Vision: Any authorized user anywhere in the state of California can immediately obtain comprehensive immunization information on any California child.

Mission: CAIR ensures the secure, electronic exchange of immunization records to support the elimination of vaccine preventable diseases. Note: CAIR regions work closely with the state to improve immunization coverage and practice.

Goal: The goal of CAIR is to improve immunization rates for all California children through an innovative public-private partnership. CAIR is a collaborative effort involving regional immunization registry services, with the support of their local health departments, the California Department of Public Health Immunization Branch, and a spectrum of key stakeholders across the state. CAIR is working to develop an integrated, secure, readily-accessible statewide network of computerized immunization information systems to make each child’s full immunization history available to providers and other authorized users, such as schools, foster care, and juvenile detention centers. The system will ensure that users have rapid access to complete and up-to-date immunization records, as well as expert vaccine forecasting. A major objective is to eliminate both missed opportunities to immunize and unnecessary duplicate immunizations
Chapter 2  System Requirements

In this chapter:

Internet Access
Hardware Requirements
Software Requirements
Internet Access
CAIR is a web-based application. You will need reliable Internet access, preferably with a dedicated high-speed connection. A dial-up connection will also work but is not recommended.

Hardware Requirements
The following are minimum hardware requirements for accessing CAIR:

- Pentium 500 MHz computer
- 64 MB RAM
- 500 MB free disk space
- Screen display set at a minimum of 800 x 600 resolution and 256 colors
- Mouse and keyboard

Compatible Web Browsers:
- Microsoft® Internet Explorer, version 9.0, Chrome, Firefox, Safari
- Adobe Acrobat Reader® 6.0 or higher
Chapter 3 Accessing CAIR

In this chapter:
- Opening CAIR
- Post Login
- Exiting CAIR
- CAIR Security
Opening CAIR
To access the CAIR Web site, follow these steps:

1. Open any browser.
2. Type the internet address for the CAIR website, https://cair.cdph.ca.gov/, in the address box at the top of the browser. Once this page displays, you may want to save this link in your favorites.

3. On the login page for CAIR, enter your Organization Code (Org Code), Username and Password. Click the Login button. If you do not know your clinic’s Org Code, contact the CAIR Help Desk at 800-578-7889.

4. Depending on your browser, you may receive one or more security/certificate warnings before the browser will open the site. Accept any warnings regarding secure connections or security certificates (click Yes to proceed). Internet Explorer will give you the option of turning off these warnings for future use.
5. The content that displays upon logging into CAIR is determined by your individual user rights.

6. User accounts set up with access to one organization will be taken to the CAIR home page shown below.
7. User accounts set up with access to more than one organization will be taken to the Manage Access/Account screen shown below.

---

**Note**: Org Code, Username, and Password are case-sensitive. They must be entered in the exact way you receive them from the CAIR Help Desk. It is also recommended to not allow your browser to save passwords. It will not be able to recreate the three-part log in but it is still considered good security measures to not agree to this.

**Post Login**

Once in CAIR, you may access the Manage Access/Account screen to switch organizations or manage your own account depending upon the specific role that was assigned to you when your account was set up. To do this, click the Manage Access/Account button at the top of the screen in CAIR. The Manage Access/Account screen will display. For more information on the functions available on the Manage Access/Account screen, refer to the Managing Users and Organizations (Chapter 6) and Managing My Account (Chapter 7) of this manual.

**Exiting CAIR**

To exit from the CAIR application, click the logout button on the menu bar at the top of the CAIR screen. You may logout in this manner from any screen within CAIR.
**CAIR Security**

CAIR provides warning messages after one, two, three and four unsuccessful login attempts. Upon the fifth unsuccessful login attempt, CAIR will lockout the user and require contact with the local system administrator or CAIR Helpdesk.

You will be required to change your CAIR password periodically. CAIR will display the Change Password screen when your password has expired or has been set or reset by your the CAIR Helpdesk.

**Note:** Each person that will be accessing CAIR is required to have their own user account. CAIR user accounts cannot be shared.

**CAIR IIS Security Questions**

1. Upon login, new CAIR Users will be required to fill out 3 Security Questions in order to use the Forget Password option.
2. When the user first logs into the CAIR application they will see the Security Notification and are required to agree in order to proceed with using the application.
Security Notification

Users of the CAIR Portal are required to have read the CAIR Confidentiality Policy. The document can be obtained through the hyperlink below.

By selecting "I Agree" you are stating that you have read, understand, and agree to abide by the CAIR Confidentiality Policy and the requirements contained within.

You also understand that, if you violate CAIR confidentiality requirements, your access to CAIR data can be terminated and you may be subject to penalties imposed by law.

If you select "I Do Not Agree" your access to the CAIR applications will be terminated!

You will be required to renew your agreement every 365 days.

CAIR Confidentiality Policy

3. When the user clicks I agree and then changes their password, they are prompted to fill out the Security Questions.

4. The user will have to fill out three distinct questions from the drop down pick lists
   a. Each Answer needs to be a minimum of five characters
b. Each answer needs to be unique and different from any other answers to previous questions.

5. The user can update these questions any time by clicking on the security questions link under Manage My Account.

6. If a user forgets their password to log into CAIR, they can click on the Forget Password button on the CAIR Login Page.

7. The user will be prompted to enter their Org code, username and email address
   a. The users correct email address must be on file with CAIR with their user credentials or they will not be able to utilize this feature.
8. The user will then be sent a URL to their email account and they will be directed to change their password with in CAIR.
Chapter 4 Optimizing CAIR

In this chapter:

- Optimizing Browser Performance
- Running Reports with Adobe Acrobat® Reader
- Efficient Screen Navigation
Optimizing Browser Performance
Your Internet browser automatically saves a copy of each new web page visited to the computer’s hard drive by default. Over time, these saved files can slow down the browser’s performance. This potential problem is avoided by changing browser settings to automatically delete the temporary Internet files each time the browser is closed.

Deleting Temporary Internet Files (Internet Explorer)
To automatically delete all temporary Internet files each time Internet Explorer is closed:

1. Click **Tools** on your browser’s menu bar.
2. Click **Internet Options**.
3. Click the **Advanced** tab.
4. Scroll to the **Security** heading and check the box next to the command, “Empty Temporary Internet Files folder when browser is closed”.
5. Click **OK**.
Operating in Full-Screen Mode (Internet Explorer)

To view most elements of CAIR with a minimal amount of scrolling, change the browser to full screen mode by pressing F11 on the keyboard. This mode allows minimal browser commands and maximum viewing area for CAIR. To return to normal screen mode, press F11 again.

Running Reports with Adobe Acrobat Reader®

CAIR uses at a minimum Adobe Acrobat Reader® 6.0 to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

Running Acrobat Reader® Files

The first time a report is displayed using Acrobat Reader®, a window may appear asking whether you want to run the file or save the file to disk. Click “Run the file” and “Do not display this message again”.

If you try to print a report in Acrobat® and find that some of the text is illegible, choose File, Preferences and General on the Acrobat® menu bar. In the General Preferences dialog box, make sure the “Smooth Text and Images” box is checked.

Problems Running Reports in Acrobat®

If, while using Adobe Acrobat Reader® 6.0, you get a small icon resembling a Rubik’s cube and the report does not display Acrobat Reader® needs to be opened in a separate window. To do this, follow these steps:

1. Click the Start button on the lower left corner of your computer screen
2. Click Programs
3. Click Adobe Acrobat Reader
4. On the Acrobat Reader® menu bar, click on File
5. Choose Preferences
6. Choose General
7. Under Options, uncheck Web Browser Integration
8. Click OK

Try to run your report again. If you continue to have problems contact the CAIR Help Desk at (800) 578-7889.

Efficient Screen Navigation

Microsoft Windows® often allows users several ways to accomplish certain tasks. Because CAIR runs under Windows®, it also allows users to use these methods to enter data. Learning the shortcuts in this section will help you increase your efficiency when entering data in CAIR, particularly by reducing the number of times you will need to switch from keyboard to mouse. These shortcuts will work in almost all Microsoft® software, not just Internet Explorer.
Keyboard Shortcuts in CAIR

Deleting data: When a field or a portion of a field is highlighted, typing something deletes the highlighted information and replaces it with the characters you typed. If you press the Delete or Backspace key, the highlighted information is deleted. To place the cursor in a specific position within highlighted text, position the cursor where you want it and click the left mouse button once.

Tab: The Tab key advances the cursor to the next field. Internet Explorer moves through the fields in the order specified by the web page. When the cursor reaches the last field, it advances back to the first field on the screen when Tab is pressed.

Shift+Tab: Holding down the Shift key and pressing the Tab key will bring the cursor back to the previous field. In Internet Explorer, the cursor will go back to the previous field defined by the web page.

Enter: In most cases, the Enter key will complete entry of information on the current screen. Most screens have a default button that is activated when the Enter key is pressed — this button could be called Save, Submit, OK, etc. However, you should always confirm that you have clicked the “Save” button if needed to retain any changes or updates you have made to the system.

← (Left Arrow): The left arrow key moves the cursor one character to the left.

→ (Right Arrow): The right arrow key moves the cursor one character to the right.

Ctrl+←: Holding the Ctrl key and pressing the left arrow key moves the cursor one word to the left.

Ctrl+→: Holding the Ctrl key and pressing the right arrow key moves the cursor one word to the right.

Ctrl+A: Holding down the Ctrl key and pressing the A key will select all the text in the current field.

Ctrl+C: Holding down the Ctrl key and pressing the C key will copy all highlighted text in the current field to the clipboard without changing the highlighted field.
Ctrl+V: Holding down the Ctrl key and pressing the V key will insert (“paste”) the contents of the clipboard at the current cursor position.

Ctrl+X: Holding down the Ctrl key and pressing the X key will cut all highlighted text from the current field and place it on the clipboard.

Delete: The Delete key deletes the character to the right of the cursor. If the field is highlighted, all highlighted text is deleted.

Backspace: The Backspace key deletes the character to the left of the cursor. If the field is highlighted, all highlighted text is deleted.

Home: The Home key positions the cursor to the left of the first character in the field.

End: The End key positions the cursor to the right of the last character in the field.

Shift: Using the Shift key in conjunction with any key affecting cursor position will highlight all characters in the field between the starting cursor position and the ending cursor position. For example, if the cursor is at the end of a field and Shift+Home is typed, the cursor is repositioned to the left of the beginning of the field and the entire field is highlighted.

Ctrl: Using the Ctrl key in conjunction with any key affecting cursor position will move the cursor all the way to either end of the field, or the next space in the indicated direction. Using the Ctrl and Shift keys simultaneously not only moves the cursor, but also highlights all text in the field between the starting cursor position and the ending cursor position.

Space: When the cursor is at a check box, the Space bar toggles the check mark on and off.
Mouse Shortcuts in CAIR

Unless otherwise specified, mouse clicks refer to the left mouse button. Internet Explorer automatically positions the cursor in the field specified by the Web page. To position the cursor, click the mouse in the desired field.

Clicking in a field: Clicking in a field will place the cursor in that position.

Double-clicking in a field: When a field contains one character string with no spaces, you may highlight the entire field by double clicking anywhere in the field. If the field contains words separated by spaces, double clicking highlights only the word at which the cursor is pointing.

Triple-clicking in a field: When a field contains words separated by spaces, the entire field may be highlighted by triple clicking anywhere in the field.

Dragging the mouse: To highlight a field, hold down the left mouse button within a field and drag the mouse across the field.

Right-clicking in a field: When you right-click in a field, CAIR displays a pop-up menu with various options. If any items are grayed out, there is either no text currently selected or no text is currently on the clipboard. The pop-up menu or toolbar options are as follows:

Undo: Selecting the Undo option reverses your last action. Undo may be repeated several times.

Cut: Selecting the Cut option deletes all highlighted text in the current field and places it on the clipboard.

Copy: Selecting the Copy option duplicates all highlighted text in the current field on to the clipboard without changing the highlighted field.

Paste: Selecting the Paste option inserts the contents of the clipboard into the current field.
Delete: Selecting the Delete option removes the highlighted text without placing it on the clipboard.

Select All: Selecting the Select All option highlights all text in the current field.
Chapter 5 Home Page

In this chapter:

Menu Bar
Menu Panel
Announcements
Release Notes
Inventory Alerts
To access the CAIR home page please follow the instructions outlined in the Chapter 3 of the CAIR User Manual.

The home page of CAIR is divided into several sections. It may be necessary to use the vertical scroll bar to the right of the CAIR screen to view all sections of the home page.

Menu Bar
At the top of the page, you have several menu options. These menu options will appear on every page within CAIR. The options available are the following:

**Home:** Clicking this menu option will return you to the CAIR home page from anywhere in the application.

**Manage Access/Account:** Clicking this menu option will bring you to the Manage Access/Account page. Here you may switch organizations, manage your account, manage access to other accounts, and manage training. Refer to Managing Users and Organizations (Chapter 6) and Managing My Account (Chapter 7) of this manual for more information on these functions.

**Forms:** Clicking this menu option shows a list of hyperlinks for printing blank forms and supporting documentation: user manual, data exchange specifications, site and user agreements, parent information, and policies.

**Related Links:** Clicking this menu option displays links to other web sites that contain information of interest to the immunization community.
Logout: Clicking this menu option will log you out of your current CAIR session. You may logout from any screen within CAIR. The system then gives you the option to return to login to CAIR.

Help Desk: Clicking the Help Desk menu option will give you a screen with contact information for the CAIR Help Desk.

Online Help: Clicking the light bulb brings up page-specific help. Refer to the Appendix of this manual for more information about online help.

Directly below the menu bar is a row of information highlighted in light yellow. This row contains your organization’s name, your first and last name, and your role within CAIR for your organization. If any of this information is incorrect contact the Help Desk.

Menu Panel
The menu panel is blue and appears on the left side of all screens within CAIR.

Menu Selections
These links are used to navigate the CAIR application. They are grouped under categories such as: Patients, Reports, Inventory and others. To perform a particular function in CAIR click on the appropriate link. Your role will determine your access to these functions.

Announcements
The center portion of the home page contains important information on enhancements and maintenance relating to CAIR. Announcements that have not been viewed will be marked “New”. To view a full announcement:

1. Click the underlined announcement title. The CAIR Announcement screen will display the details and the posting date.
2. Click the Return to Main Page link to return to the home page.

Release Notes
Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of CAIR. Release notes may be viewed in the same manner as Announcements.

Inventory Alerts
The inventory Alerts section will appear on the CAIR home page under the Release Notes section. This section consists of four tables.

- The first table, Vaccine Order/Transfer Notification, lists orders/transfers that have been shipped, are awaiting return shipment, or have been rejected.
• The second table, *Active Inventory That is Going to Expire or Expired Lots with a Quantity*, lists vaccines that are going to expire (within 30 days is the default setting) as well as lots which have expired and still have a quantity.

• The third table, *Inventory that is Running Low by Vaccine Group*, lists inventory that is nearly depleted by vaccine group.

• The fourth table, *Inventory that is Running Low by Trade Name*, lists inventory that is nearly depleted by trade name.
Chapter 6 Managing My Account

In this chapter:

Editing User Information
Editing User Information

Editing My User Account

CAIR allows all users to manage their own user account information.

1. Click the **Manage Access/Account** tab on the CAIR home page header.

2. Under the Manage My Account section of the menu panel, click **Edit My User Account**. This displays the Edit User page, as shown below:
3. Edit your first or last name in the appropriate fields. You may also enter or edit any additional fields as necessary. Verify that your email address or business phone number is correct. We strongly recommend that all users maintain a current email address in the IIS.

4. Click the **Save** button. If changes were made the message, “User Updated” appears on the screen.

**Note:** The first and last name fields on the Edit User screen are required fields, which is why they show in blue with an asterisk.
Chapter 7 Managing Inventory

In this chapter:

- Adding New Inventory
- Viewing Inventory
- Updating Inventory
- Inventory Alerts
- Viewing Inventory Transactions
- Creating Transfers
- Accepting or Rejecting Shipments
- Shipping and Restocking Transfers
- Transaction Summary Report
- Doses Administered Report
The Inventory Module in CAIR is designed to be a complete tracking system for an organization’s vaccine inventory. Power users of CAIR have the ability to set up the inventory module for their organization and can view, add or update any vaccine in an organization’s inventory. Inventory will automatically decrement doses entered through the web—based User Interface, assuming that “From Inventory” is checked on the “Add Immunizations” page. Functionality to decrement inventory from data reported through electronic data exchange is also available, assuming that sending organization indicates that the doses administered came from inventory and the data matches an existing inventory lot in CAIR.

Adding New Inventory

Use the Add Vaccine function only if you are setting up your inventory for the first time, or if you are adding a vaccine with a new lot number. If you are adding vaccine to a lot number that already exists in your inventory, refer to the Updating Inventory section in this chapter.

1. Click Manage Inventory under the Inventory section of the menu panel.
2. On the Inventory Alerts page, click the Show Inventory button.
3. Click the Add Inventory button.
4. On the Add Vaccine Inventory Information page:

   a. Choose the Vaccine Group from the drop down list. Once you have selected the Vaccine Group, the Trade Name list will display with Trade Names only for the Vaccine Group selected. Note that the three radio buttons on the right allow the user to filter by either group, trade name, or manufacturer.

   b. Choose the vaccine’s trade name from the drop down list provided. Once you have selected a Trade Name the Manufacturer field will be populated.
c. Optional - Choose the National Drug Code (NDC) from the drop-down list that matches what you received.
d. Once you have selected NDC, the Packaging drop-down list will populate. Choose the packaging type that matches what you received.
e. Enter the lot number of the vaccine in the Lot Number field.
f. Choose the dose size from the Dose drop down list; choose .2, .25, .5, .65, 1, or 2 ml.
g. Enter the vaccine lot’s expiration date. Fill in the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Click the OK button. If no day is specified on the vaccine, enter the last day of the month.
h. Select the appropriate funding source for the lot being added.
   i. VFC – Vaccine for Children funding Source
   ii. 317 - 317 Eligible: LHD or HDAS Only
   iii. SGF – State General Fund Eligibility
   iv. PVT – Private
   
i. Choose Yes from the Lot Active drop down list. When adding new inventory the lot may only be entered as active. This controls whether the lot appears on the drop down list on the Add Immunization page.
j. Enter the number of vaccine doses received in the Quantity on Hand field.
k. Cost Per Dose is optional for clinic use: how much clinic pays per vaccine, patient fee, or clinic administration charge.

5. Click the Save button.
6. If the new vaccine was saved successfully, the message “Inventory was inserted successfully” will appear at the bottom of the page.
7. To add additional vaccines, click the Add New button and repeat Steps 4-5.
8. To return to the Show Inventory page, click the Cancel button.

Viewing Inventory
To view your organization’s vaccine inventory in CAIR, follow these steps:

1. Click Manage Inventory under the Inventory section of the menu panel.
2. Click the Show Inventory button.
3. The inventory table shown by default will VFC, 317, SGF, PVT vaccine inventory associated with your organization. You can view funding sources individually by selecting either from the dropdown menu.

4. Select one of the following options:
   a. **Active**: to view only those vaccine lots that have valid (nonexpired) doses remaining in the inventory module
   b. **Inactive**: to view only those vaccine lots that have been set to inactive by a user or automatically inactivated due to no doses remaining
   c. **Non-Expired**: to view any active or inactive inventory that has not yet expired
   d. **Expired**: to view any inventory that has expired

   ![Inventory Table]

   **Note**: The red text in the View Inventory page indicates that a vaccine is inactive. A vaccine may be inactive for a number of reasons such as the inventory for that vaccine’s lot number may have been decremented to zero, the vaccine may have expired, or it may have been recalled and set to inactive by a user.

   Vaccines on the View Inventory page that are highlighted in pink will expire within 30 days.
The following is an explanation of the columns in the inventory screen:

a. **Select**: A mark in this checkbox allows you to modify the quantity of the selected vaccine.

b. **Trade Name**: This lists the vaccine’s trade name.

c. **Funding Source**: This displays the funding source for the vaccine.

d. **Lot Number**: This lists the lot number of the vaccine.

e. **Packaging**: This refers to the type and quantity of doses in each package. Ex: 1x10 VIALS means a 10-pack of singledose vials.

f. **NDC**: This displays the National Drug Code (NDC) for the vaccine.

g. **Inv On Hand**: This lists the number of doses remaining in the organization’s inventory.

h. **Active**: A “Y” indicates the inventory is active (available for use). An “N” indicates the vaccine is inactive (not available for use). Inactive vaccines are shown in red text.

i. **Exp Date**: This lists the vaccine’s expiration date. Vaccines that will expire in 30 days or less are highlighted in pink.

**Updating Inventory**

There are two ways to change information for existing vaccines.

1. Click **Manage Inventory** under the Inventory section of the menu panel.

2. Click the **Show Inventory** button.

3. The inventory table will display active vaccines by default.

4. Click the vaccine’s trade name (which is a hyperlink) associated with the lot number you want to update.

5. On the next page, make desired changes to any of the fields.

6. Click the **Save** button. Changes made to vaccine inventory after doses have been administered will be updated in patients’ records who have previously received a dose from that vaccine lot.

Alternatively:

To only modify the quantity of doses on hand, select the checkbox under the Select column for the appropriate lot.

1. Click the **Modify Quantity** button located in the upper right hand corner of the page.

2. Choose whether you would like to Add or Subtract from the inventory on hand from the Action drop down list.

3. Enter the quantity of doses to be added or subtracted in the Amount field.

4. Choose an option from the Reason drop down list.

5. Add Reason Notes. This is a free text field for the user to add more context for the modification.

6. Click the **Save** button.

7. Once your updates are saved in CAIR, the message “Inventory was updated successfully” will appear at the bottom of the page.

8. Click the **Cancel** button to return to the Show Inventory/Manage Inventory page.
Table 1: Reasons for adding or subtracting inventory

<table>
<thead>
<tr>
<th>Receipt of Inventory</th>
<th>Adding new inventory to a particular lot.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Error Correction</td>
<td>Adding to or subtracting from inventory doses that were incorrectly entered or when receiving extra or fewer doses from a vial.</td>
</tr>
<tr>
<td>Spilled/Broken</td>
<td>Subtracting inventory that has been spilled or broken</td>
</tr>
<tr>
<td>Doses Recalled by Manufacturer</td>
<td>Subtracting inventory that has been recalled.</td>
</tr>
<tr>
<td>Doses Administered</td>
<td>Subtracting inventory due to giving dose(s) to a patient that were not deducted from inventory.</td>
</tr>
<tr>
<td>Transfer In</td>
<td>Adding vaccines transferred in. Manual adjustment to inventory.</td>
</tr>
<tr>
<td>Transfer Out</td>
<td>Subtracting vaccines transferred out. Manual adjustment to inventory.</td>
</tr>
<tr>
<td>Spoilage/Storage reported by Provider</td>
<td>Subtracting inventory due to vaccines spoiling prior to expiration.</td>
</tr>
<tr>
<td>Lost or damaged in transit to Provider</td>
<td>Subtracting inventory due to broken vials or faulty syringes that occurred during shipping.</td>
</tr>
<tr>
<td>Failure to store properly upon receipt by Provider</td>
<td>Subtracting inventory due to improper storage.</td>
</tr>
<tr>
<td>Refrigeration failure reported by Provider</td>
<td>Subtracting inventory due to improper refrigeration.</td>
</tr>
</tbody>
</table>
Lost or unaccounted for in Provider inventory | Subtracting inventory due to lost inventory or inventory that cannot otherwise be accounted for.
---|---
Other | Subtracting inventory due to other reasons not specified above, such as patient refused vaccine.

Modifying Quantities of Multiple Vaccines

To change inventory quantities of multiple vaccine lots:

1. Follow Steps 1-3 under the Updating Inventory section.
2. Check the box under the Select column next to the vaccine lots whose quantities you want to modify.
3. Click the Modify Quantity button.
4. On the Modify Quantity on Hand for Selected Site(s) page, enter the following information:
   a. Under Action, choose whether you would like to add or subtract from the inventory on hand.
   b. Under Amount, enter the quantity of inventory to be added or subtracted.
   c. Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason drop down list. Refer to the list above for a description of the reasons for adding or subtracting inventory.
5. Click the Save button.

Inventory Alerts

Inventory Alerts inform users of the status of their organization’s vaccine inventory. These alerts are displayed on the user’s CAIR homepage. Alerts for vaccines that are going to expire and vaccines that are running low are initially generated by a system default setting. These alerts can be customized.

Inventory alerts can also be viewed on the Manage Inventory page. Select Manage Inventory located under the Inventory heading on the menu panel.

Each table under Inventory alerts heading contains the following information:

- **Vaccine Order/Transfer Notification**: displays current orders/transfers along with their status.
- **Active Inventory that is Going to Expire or Expired Lots with a Quantity**: displays a list of vaccines that will expire within a set amount of days (30 days is the default) as well as vaccines that are expired but still have quantity in inventory.
- **Inventory that is running low by vaccine group**: displays inventory that is below a specific threshold of volume, organized by vaccine group (the default low-level alerts is 5 doses).
• **Inventory that is running low by trade name**: displays inventory that is below a specific threshold of volume, organized by trade name (the default low-level alerts is 5 doses).

*Updating Inventory Alert Preferences*

To update Inventory Alert Preferences for expiration and low inventory Alerts:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Update ALERT Prefs** button.
3. On the Inventory Expiration Alerts page, the system default is 30 days. To customize this Alert enter the number of days you want to be notified prior to the expiration of any vaccine lot.
4. For all low-level Alerts, the system default is 5 doses. Select the appropriate radio button for **Vaccine Group** or **Trade Name** in the **Update Low-Level Alert Defaults** section, and enter the number of doses you prefer.

5. Click the **Save** button. If the new preferences were saved successfully, the message "Updated Alert Preferences" displays at the top of the page.

To customize low-level Alerts for each individual vaccine group or trade name:

**Vaccine Group**

1. Under Update Low-Level Alerts by Vaccine Group, enter the number of doses that will indicate the inventory is running low for each vaccine group listed for both State-Supplied and Privately Purchased vaccines.
   - Click the **Save** button.
Managing Inventory

Trade Name
1. Under **Update Low-Level Alerts by Vaccine Group**, click the underlined vaccine group to display the trade names.
2. Enter the number of doses that will indicate the inventory is running low for the trade names listed for both State-Supplied and Privately Purchased vaccine.
3. Click the **Save** button.

<table>
<thead>
<tr>
<th>Trade Name</th>
<th>PVT</th>
<th>317</th>
<th>VFC</th>
<th>SGF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ixaro</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note**: To restore all inventory Alerts to CAIR system defaults, click the Restore Defaults button. Click the **OK** button. To return to the Manage Inventory page, click the **Cancel** button.

Printing Inventory

To print a list of inventory:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.
3. Click anywhere on the page.
4. Print according to your system’s requirements, which could include:
   a. Click **File** and click **Print**.
   b. Click the Printer icon in the browser’s toolbar.
   c. Simultaneously press **CTRL+P** on the keyboard.
5. If your printout is cut off, try setting your printer to print in landscape.

Viewing Inventory Transactions

The Show Transactions page is used to display vaccine lot track records for all inventory quantity-changing events. To run an inventory transaction report:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Transactions** button.
3. Enter the “From” and “To” dates for when the immunizations were entered in or submitted to CAIR.
4. Alternatively, enter the “From” and “To” dates for when the immunizations were administered to the patient(s).
5. Choose a specific user name or All User Names.
6. Choose a specific transaction type or All Transaction Types. These transactions relate to the Reason drop down list on the Edit Vaccine Inventory Information page.

7. Select the inventory site whose transactions you wish to view or choose All Sites with Inventory.

8. Choose a specific Trade Name/Lot Number/Funding Source or choose All Lot Numbers.

9. Enter the quantity of records you wish to view in the Display Last <#> Records field.

10. Click the View button. The Vaccine Transactions page displays:

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Trans Date</th>
<th>Lot</th>
<th>Funding Source</th>
<th>Trade Name</th>
<th>Type</th>
<th>Qty</th>
<th>Patient Id</th>
<th>Patient Name</th>
<th>DOB</th>
<th>Username</th>
</tr>
</thead>
<tbody>
<tr>
<td>IR Physicians</td>
<td>05/31/2016</td>
<td>V1</td>
<td>FCS</td>
<td>Adeno T4</td>
<td>Immunize</td>
<td>-1</td>
<td>191</td>
<td>TEST, VONE</td>
<td>05/31/2001</td>
<td>vdshaul</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>05/31/2016</td>
<td>V2</td>
<td>317</td>
<td>Adeno T4</td>
<td>Immunize</td>
<td>-1</td>
<td>191</td>
<td>TEST, VONE</td>
<td>05/31/2001</td>
<td>vdshaul</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>06/06/2016</td>
<td>VF</td>
<td>55</td>
<td>Adeno T4</td>
<td>Immunize</td>
<td>-1</td>
<td>167</td>
<td>VPARENT, UATWO</td>
<td>10/18/2000</td>
<td>vdshaul</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>06/06/2016</td>
<td>VFC</td>
<td>309</td>
<td>VFC</td>
<td>Immunize</td>
<td>-1</td>
<td>167</td>
<td>VPARENT, UATWO</td>
<td>10/18/2000</td>
<td>vdshaul</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>06/14/2016</td>
<td>1011</td>
<td>101</td>
<td>SGF</td>
<td>AFlurIA</td>
<td>Immunize</td>
<td>-1</td>
<td>208</td>
<td>PATIENT, MIKE</td>
<td>10/17/2007</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>06/15/2016</td>
<td>1011</td>
<td>10</td>
<td>SGF</td>
<td>AFlurIA</td>
<td>Immunize</td>
<td>-1</td>
<td>4415</td>
<td>TEST, ERIC</td>
<td>07/21/2000</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>06/15/2016</td>
<td>1011</td>
<td>10</td>
<td>SGF</td>
<td>AFlurIA</td>
<td>Immunize</td>
<td>-1</td>
<td>4415</td>
<td>TEST, ERIC</td>
<td>07/21/2000</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>06/15/2016</td>
<td>1011</td>
<td>10</td>
<td>SGF</td>
<td>AFlurIA</td>
<td>Immunize</td>
<td>-1</td>
<td>4415</td>
<td>TEST, ERIC</td>
<td>07/21/2000</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>06/17/2016</td>
<td>1897</td>
<td>ABC</td>
<td>VFC</td>
<td>Convax</td>
<td>Immunize</td>
<td>-1</td>
<td>4453</td>
<td>POWELL, NICHOLAS</td>
<td>05/03/2004</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>07/15/2016</td>
<td>TESTLOT15</td>
<td>317</td>
<td>FluMist Quadrivalent</td>
<td>Immunize</td>
<td>-1</td>
<td>4710</td>
<td>TESTER, INVENTORY</td>
<td>12/01/2000</td>
<td>alertis_admin</td>
</tr>
<tr>
<td>IR Physicians</td>
<td>07/15/2016</td>
<td>TESTLOT15</td>
<td>PVT</td>
<td>FluMist Quadrivalent</td>
<td>Immunize</td>
<td>-1</td>
<td>4719</td>
<td>TESTER, INVENTORY</td>
<td>12/01/2000</td>
<td>alertis_admin</td>
</tr>
</tbody>
</table>

### Vaccine Transactions Totals

<table>
<thead>
<tr>
<th>Trans Code</th>
<th>Trans Description</th>
<th>Trans Count</th>
<th>Trans Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>REC</td>
<td>Receipt of Inventory</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Immunize</td>
<td>Immunizations Given</td>
<td>1</td>
<td>-11</td>
</tr>
<tr>
<td>Delete</td>
<td>Immunizations Deleted</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>TRA</td>
<td>Doses Transferred</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>Spoilage reported by provider</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Expiration reported by Provider</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>Lost or damaged in transit to Provider</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>Failure to store properly upon receipt by Provider</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>7</td>
<td>Refrigeration failure reported by Provider</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>11</td>
<td>Lost or unaccounted for in Provider inventory</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>12</td>
<td>Other - Not Usable, reported by Provider</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>RECALL</td>
<td>Doses Recalled</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ADMIN</td>
<td>Doses Administered</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>TRAEXP</td>
<td>Exired Doses Transferred</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>BORROWEDIN</td>
<td>Borrowed In</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>BORROWEDOUT</td>
<td>Borrowed Out</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>BORROWED</td>
<td>Borrowed Imm Given</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>RET</td>
<td>Doses Returned</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ERR</td>
<td>Error Correction</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>RECON</td>
<td>Doses Reconstituted</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>LOTDELETE</td>
<td>Lot Deleted</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Transaction Totals: 11  -11
**Table 2: Transaction Types**

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt of Inventory</td>
<td>Vaccines were added as new inventory.</td>
</tr>
<tr>
<td>Immunization Given</td>
<td>Vaccines were subtracted from inventory because of immunizations given.</td>
</tr>
<tr>
<td>Immunization Deleted</td>
<td>Vaccines were added to inventory because they were deleted from a patient's record.</td>
</tr>
<tr>
<td>Doses Transferred (TRA)</td>
<td>Vaccines were subtracted due to transfer to another site.</td>
</tr>
<tr>
<td>Transferred In</td>
<td>Doses of vaccine added to inventory to pay back vaccine that was given to a patient with a mismatch between vaccine eligibility code and vaccine lot funding source</td>
</tr>
<tr>
<td>Transferred Out</td>
<td>Vaccine doses removed from inventory when immunization was given from lot whose funding source does not match vaccine eligibility code; adjustment when immunization not deducted at time of vaccination</td>
</tr>
<tr>
<td>Borrowed Imm Given</td>
<td>Vaccines were subtracted from inventory because of immunizations given to a patient with a mismatched funding program.</td>
</tr>
<tr>
<td>Spoilage/Storage issue reported by provider</td>
<td>Vaccines were subtracted due to vaccines spoiling prior to expiration.</td>
</tr>
<tr>
<td>Expiration Reported by Provider</td>
<td>Vaccines were subtracted due to vaccines expiring.</td>
</tr>
<tr>
<td>Lost or damaged in transit to Provider</td>
<td>Vaccines were subtracted due to broken vials or faulty injections that occurred while being shipped.</td>
</tr>
<tr>
<td>Failure to store properly upon receipt by Provider</td>
<td>Vaccines were subtracted due to improper storage.</td>
</tr>
<tr>
<td>Refrigeration failure reported by Provider</td>
<td>Vaccines were subtracted due to improper refrigeration.</td>
</tr>
<tr>
<td>Lost or unaccounted for in Provider inventory</td>
<td>Vaccines were subtracted due to lost inventory.</td>
</tr>
<tr>
<td>Other - not usable, reported by Provider</td>
<td>Vaccines were subtracted due to other reasons not specified above.</td>
</tr>
<tr>
<td>Doses Recalled</td>
<td>Vaccines were subtracted due to recall.</td>
</tr>
<tr>
<td>Doses Administered</td>
<td>Vaccines were subtracted due to giving dose(s) to a patient—used for manual adjustment of inventory for reconciliation.</td>
</tr>
<tr>
<td>Doses Returned</td>
<td>Vaccines were added to inventory after being returned from another site.</td>
</tr>
<tr>
<td>Error Correction</td>
<td>Vaccines added or subtracted due to error correction.</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>Doses Reconstituted</td>
<td>Number of doses that were subtracted from an unreconstituted lot to form a new reconstituted lot</td>
</tr>
<tr>
<td>Transfer out Expired Inventory</td>
<td>Number of doses that were subtracted from an expired lot when a transfer of expired doses is created</td>
</tr>
<tr>
<td>Lot Deleted</td>
<td>Number of doses that were subtracted from a lot when a vaccine lot was deleted</td>
</tr>
</tbody>
</table>

**Table 3: Vaccine Transactions**

The top chart on the Vaccine Transactions page gives the following information:

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Vaccines in the table are first sorted alphabetically by your site name.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trans Date</td>
<td>Vaccines are next sorted numerically by transaction date; the most recent transactions are shown first.</td>
</tr>
<tr>
<td>Lot/Funding Source/ Trade Name</td>
<td>The Lot Number, Funding Source, and Trade Name of the vaccine are listed in this column.</td>
</tr>
<tr>
<td>Type</td>
<td>Refer to Table 2 in this chapter for an explanation of the transaction codes shown in this column.</td>
</tr>
<tr>
<td>Qty</td>
<td>The quantity added to or subtracted from inventory due to the listed transaction type.</td>
</tr>
<tr>
<td>Patient ID</td>
<td>CAIR Patient ID involved in the transaction.</td>
</tr>
<tr>
<td>Patient Name</td>
<td>The patient associated with the transaction, if applicable.</td>
</tr>
<tr>
<td>DOB</td>
<td>The date of birth of the patient, if applicable.</td>
</tr>
<tr>
<td>Username</td>
<td>Username of the user that completed the transaction</td>
</tr>
</tbody>
</table>

**Table 4: Transaction Totals**

The chart at the bottom of the Vaccine Transactions page gives a breakdown of transactions by type.

<table>
<thead>
<tr>
<th>Trans Code</th>
<th>Abbreviated code that identifies the transaction type.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trans Description</td>
<td>Full transaction type.</td>
</tr>
<tr>
<td>Trans Count</td>
<td>Number of times a particular transaction type was performed within the dates you specified.</td>
</tr>
<tr>
<td>Trans Value</td>
<td>Quantity of doses added or subtracted by transaction type.</td>
</tr>
</tbody>
</table>
**Printing Inventory Transactions**

To print a list of vaccine transactions:

1. Follow Steps 1 - 4 under Viewing Inventory Transactions.
2. Click anywhere on the page.
3. Print according to your system’s requirements, which could include:
   a. Click **File** and click **Print**.
   b. Click the Printer icon in the browser’s toolbar.
   c. Simultaneously press CTRL+P on the keyboard. If your printout is cut off, try setting your printer to landscape.

**Creating Transfers**

CAIR allows you to transfer vaccines between sites within your organization or between two organizations. To create a transfer:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the **New Transfer** button.
3. Enter the following information:
   a. Sending Site will default to the organization you are logged in as.
   b. The Internal Receiving Site is not being used, leave blank.
   c. Receiving Organization is where the vaccine is being transferred to.
   d. Choose between Active and Non-Expired or Inactive and Expired vaccines by clicking the appropriate radio button.
   e. Number of doses in the Transfer Quantity field for each of the trade names being transferred
4. Click the **Save** button.
5. The message “Saved Successfully” appears to confirm your transfer.
6. You must click the **Packing List** button or the **Label** button to continue. You are not to print either document.
7. Click the **Ship** button when ready to ship the vaccines. Use either today’s date or enter an alternate date in MM/DD/YYYY format.
8. Click the **Ship** button. The message “Transfer Successfully Shipped” displays. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
9. To complete an internal transfer without printing shipping documents, click the **Finish Trans** button. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site’s inventory and deducted from the sending site’s inventory.
Shipping Documents

If your organization has sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see Creating Transfers in this chapter), or by using the following feature:

1. Click Shipping Documents under the Inventory section of the menu panel.
2. Click the Packing List button or the Label button. Print labels and/or packing list, if desired.
3. Enter a ship date if different from today’s date, using MM/DD/YYYY format.
4. Click the Ship button. The message “Transfer Successfully Shipped” displays in the upper right of the Manage Transfer page.

Accepting or Rejecting Transfers

Transfers made through CAIR and received by the provider organization must be accepted, rejected or partially accepted so that CAIR can post and track inventory properly. Organizations will also accept orders shipped to them via the Manage Transfers screen. To accept or reject a transfer:

1. Click Manage Transfers under the Inventory section of the menu panel.
2. The Manage Transfer page categorizes transfers as follows:
   a. Outbound Transfer: Displays transfers that are outbound from your organization
   b. Inbound Transfer: Displays transfers that are inbound to your organization
   c. Historic Transfer: Displays completed transfers
3. To proceed to the Receive Transfers page (where you may accept or reject transfers), locate the Inbound Transfer section and click the date (which is a hyperlink) in the Create Date column.
4. Ensure that the corresponding Type column states Transfer. On the Receive Transfer page, you may accept the entire transfer, reject the entire transfer, or partially accept some of the transfer, while rejecting the remainder.

Accept Transfer

1. Click the Accept Transfer button to accept the transfer and add all transfer items into inventory.
2. Click the OK button to continue with the acceptance and be returned to the Manage Transfers page.

Reject Transfer

1. Click the Reject Transfer button to reject the entire transfer.
2. Select one of the following reasons from the Enter Rejection Reason drop-down list.
   a. Damaged
   b. Not Wanted
   c. Wrong Vaccine
   d. Never Received
3. After selecting a reason, click the **Reject** button.
4. Click the **OK** button to continue with the rejection and be returned to the Manage Transfers page.

**Partially Accept**

1. Click the **Partially Accept** button.
2. At the Partially Accept Transfer page, select the dose quantity of the each vaccine you wish to accept and a rejection reason for those you wish to reject.
3. Click the **Save** button.
4. Click the **OK** button to continue with partially accepting the transfer and to be returned to the Manage Transfer page.

**Shipping and Restocking Transfers**

When a transfer has been rejected with a reason code of Not Wanted, Wrong Vaccine, Never Received, or Damaged it is necessary to ship and restock the transfer in the system so that the doses are correctly reported in inventory.

**Shipping Back a Rejected Transfer**

If you are the receiving site of a transfer or order that you reject, you must ship the rejected quantities back to the original sender. To ship the rejected quantities back to the original sender:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the appropriate transfer date (which is a hyperlink) under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer page by entering the date in MM/DD/YYYY format.
4. Click the **Ship** button.

**Accepting a Rejected Transfer**

If you are the original sender of a transfer, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the transfer date of the rejected transfer (which is a hyperlink) under the Create Date column.
3. Click the **Save** button at the Restock Rejected Transfer page. The Manage Transfer page will display, and the transfer will be added to the Historical section of the page.
Transaction Summary Report
The Transaction Summary Report will give you information on how many doses of each vaccine have been given within a specified date range. The report also gives information on how many doses were expired, transferred, received, restocked, wasted, or given in error. To generate a Transaction Summary Report for your organization, follow these steps:

1. Click **Transaction Summary** under the Inventory section of the menu panel.
2. At the Transaction Summary Report Criteria page, choose a site from the drop down list or choose All Sites Combined.
3. In the “From” field under Report Date Range, choose a starting date for your report using the MM/DD/YYYY format.
4. In the “To” field under Report Date Range, choose an ending date for your report using the MM/DD/YYYY format.
5. Click the **Generate Report** button.
6. The report displays in Adobe Acrobat Reader®. Print according to your system specifications.
7. Click the **OK** button in the Print Dialog box.
8. Click on your browser's Back button to return to the Transaction Summary.

**Note:** Transaction Summary does not include deleted items from inventory.
Chapter 8 Managing Patients

In this chapter:

Finding Patients
Using Drop-Down Lists in CAIR
Editing/Entering Patient Information
Saving Patient Information
Deduplication of Patients
Countermeasure and Response Administration (CRA) Module
CAIR receives immunization information from multiple provider sources, including birth record downloads. Always search for a patient in CAIR before entering them as a new patient. CAIR will attempt to de-duplicate patient records (i.e., compare entered information against information saved to the system for duplicate patients) prior to saving the information on the Enter New Patient page.

**Finding Patients**

Searching for a patient in CAIR is required and will prevent duplicate patient records from being entered into the system. There are many different combinations of search criteria that can be used to locate patients in CAIR. Remember when searching for patients, you are searching on a statewide level and not just within your organization therefore, more information is not always better. Entering too much information about a patient will decrease the odds of locating the patient in the database. To review recommended search criteria examples, please see the Examples of CAIR Search Criteria section in this chapter.

To search for a patient in CAIR:

1. Click **Patient Search** under the Patients menu group on the menu panel.

   **Patient Search Criteria**

   **Search by Patient**
   
   * Minimum search criteria includes any two fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Entering the first two letters of the patient’s last name, along with the birth date, will initiate a search of all patients matching those letters and birth date. The last name requires two or more characters. Remember patients may go by more than one last name, so vary your search options.</td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Birth Date</td>
<td></td>
</tr>
<tr>
<td>Mother's First Name</td>
<td></td>
</tr>
<tr>
<td>Home Phone</td>
<td></td>
</tr>
<tr>
<td>Cell Phone</td>
<td></td>
</tr>
</tbody>
</table>

   **Search by Medical Record Number**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Record Number</td>
<td></td>
</tr>
</tbody>
</table>

   **Search by CAIR ID**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAIR ID</td>
<td></td>
</tr>
</tbody>
</table>

   **Search by Legacy CAIR ID**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legacy CAIR ID</td>
<td></td>
</tr>
</tbody>
</table>

2. In the Patient Search Criteria box, you have several options for finding the patient. It is important to note that if you are searching by patient information (not patient ID). The minimum search criteria includes any two fields.
   a. **Last Name**: Entering the first two letters of the patient’s last name, along with the birth date, will initiate a search of all patients matching those letters and birth date. The last name requires two or more characters. Remember patients may go by more than one last name, so vary your search options.
b. **First Name:** Entering the first two letters of the patient’s first name, along with the birth date, will initiate a search of all patients matching those letters and birth date. Entering a single letter along with birth date will return only patients with a single-letter first name.

### Entering Names

On all first and last names entered for patient searches, CAIR disregards spaces, apostrophes, and hyphens entered.

d. **Middle Name:** Entering the first two letters of the patient’s middle name along with the birth date will initiate a search of all patients matching those letters. Entering a single letter will return only patients with a single-letter middle name.

e. **Mother’s First Name:** Entering the first two letters of the mother’s first name will initiate a search of all patients matching those letters and birth date. Entering a single letter along with birth date will return only patients whose mother has a single-letter first name.

f. **Phone:** Entering the patient’s main 7-digit phone number (area code not required) will identify patients with the exact phone number. This method is not recommended as a phone number may not be entered and may change over time.

g. **Cell Phone:** Entering the patient’s main 7-digit phone number (area code not required) will identify patients with the exact phone number. This method is not recommended as a phone number may not be entered and may change over time.

3. Click the **Find** button.

4. If one or multiple records are found matching the criteria you entered, a table listing up to 75 possible matches with detailed information on each patient displays. To choose a patient from this list, click the patient’s last name (which is a hyperlink).

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Birth Date</th>
<th>Primary Patient Identifier</th>
<th>Mother’s First</th>
<th>Gender</th>
<th>Status</th>
<th>CAIR ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOUSE</td>
<td>MICKEY</td>
<td></td>
<td>06/24/2018</td>
<td>MARY</td>
<td>M</td>
<td>A</td>
<td></td>
<td>4568</td>
</tr>
<tr>
<td>MOUSE</td>
<td>MICKEY</td>
<td></td>
<td>01/01/1995</td>
<td>MOUSE.BABY BOY MOUSE</td>
<td>M</td>
<td>N</td>
<td></td>
<td>4462</td>
</tr>
</tbody>
</table>

AKA: MOUSE

5. If no patients match your search, review the search criteria information you entered for accuracy. If you suspect the patient has not been entered into CAIR, proceed to **Entering a New Patient** later in this chapter.
• If multiple records are found matching the criteria you entered and there are over 75 matches, CAIR displays a warning that there are too many patients matching your search criteria. In this situation, refine your search criteria to limit your patient list. Search using only the last name and birth date. This will return patients matching those letters and birth date, including patients with or without a first name.
• Alternatively, search using the last name and birth date, and enter “No First Name” in the first name field. This will narrow the search results to patients with no first name.

**Searching by Patient ID**

A patient may have numerous Patient IDs; each ID is organization dependent. Entering the Patient ID will produce a single name match. To find a patient using this method the Patient ID must have been entered previously in the patient record in CAIR and the birth date is not required. When searching with Patient ID, all other entered information is ignored.

**Examples of CAIR Search Criteria**

A minimum search of any two fields.

Patient DOB and any combination of the following:
- Last Name
- First Name
- Middle Name
- Mother’s First Name
- Phone Number
- Cell Phone Number
- Medical Record Number
- CAIR ID
- CAIR Legacy ID

**Using Drop-Down Lists in CAIR**

When entering information on new patients or editing patient information, you will use drop-down lists—fields that contain a list of options from which you may choose—rather than text fields for certain input data. The advantages of drop-down lists over text fields include:

• Ease of use. Allows users to quickly fill in a data field without typing in the information.
• Health Level 7 (HL7) compliance. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily. With predefined drop-down lists, CAIR stays in HL7 compliance.
• Uniformity of entered data. By choosing information from a drop-down list, users do not risk entering conflicting information that could decrease the accuracy of CAIR reports.
• Confidentiality. By using standard drop-down lists, CAIR avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.
Editing/Entering Patient Information

The Update Patient demographic page allows you to update or change specific, non-immunization information relating to any patient in CAIR. In order to enter a new patient, the user will click the patient search option under patients. This allows the user to search for the patient to verify if the patient is in CAIR. If the patient is not in CAIR, they can click the Add New button and this, allows you to input information for a new patient. The Update Patient and Enter New Patient pages are divided into the following sections: Personal Information, Patient AKA, Organization Information, Patient Information, Address Information, Responsible Persons, Patient Comments, and Patient Notes. Except for required demographic information, all other information in these fields is optional. Each of these fields is explained in detail below.

**Note:** Organizations participating in a pandemic exercise or event will utilize the CRA Event Information section located directly beneath the Patient Information section of the Demographic page. The CRA Event Information section will not be displayed when an organization is not participating in an exercise or event.

**Personal Information Section**

The Personal Information Section at the top of the Demographic and Enter New Patient pages contains patient-specific information used primarily to identify patients when conducting patient searches. All fields shown in blue font are required with the exception of Mother’s Maiden Last name and Mother’s First Name, which are highly recommended for patient matching. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.

<table>
<thead>
<tr>
<th>Personal Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last Name</strong></td>
<td>PATIENT</td>
</tr>
<tr>
<td><strong>First Name</strong></td>
<td>MIKE</td>
</tr>
<tr>
<td><strong>Middle Name</strong></td>
<td>TEST</td>
</tr>
<tr>
<td><strong>Suffix</strong></td>
<td>JR</td>
</tr>
<tr>
<td><strong>Birth Date</strong></td>
<td>09/25/2007</td>
</tr>
<tr>
<td><strong>Mother’s Maiden Last</strong></td>
<td><strong>On File</strong></td>
</tr>
<tr>
<td><strong>Mother’s First Name</strong></td>
<td>MARY</td>
</tr>
</tbody>
</table>

- **Last Name:** required field
- **First Name:** required field
- **Middle Name:** optional field
• **Suffix:** optional field.
• **Birth Date:** required field Complete the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field, clicking the appropriate date, and then clicking the OK button.  
  - Children entered by the Vital Records program do not have editable birth dates. The parent/guardian must contact the Vital Records program in the event a birth date is in dispute. Contact the CAIR Help Desk to obtain the Vital Records phone number.
• **Mother’s Maiden Last Name:** This field is required for patients under 19 and not required for patients over 19. This field is always recommended for future deduplication of patients. Once entered, it will be kept confidential and the field will display (On File).
• **Mother’s First Name:** This field is required for patients under 19 and not required for patients over 19; however, it will request you gather this information for future deduplication of patients.

**Note:** It is critical that the information in the Mother’s Maiden Last Name and Mother’s First Name fields is accurate.

- **Gender:** required field.
- **Medi-Cal ID:** optional field
- **Birth Order:** optional field: Only enter this field for multiple births, such as twins or triplets. It is a number indicating the order in which the patient was born during the birthing event. **Birth Country:** defaults to United States: Use the drop-down list to select a different country of birth, if applicable.
- **Birth State:** optional field: Use the drop-down list to select a state of birth, if applicable.
- **Birth County:** optional field: Use the drop-down list to select a county of birth, if applicable.
- **Medical Record Number:** displays organization’s primary patient identifier  
  (See the Organization Information section for adding/removing patient identifiers.)

**Patient AKA Section**

The Patient AKA section gives other names that the patient may be known as. A patient can have several different AKAs.

1. Click the **Patient AKA** heading to expand the information in that section.
a. Last Name: required field when entering AKA information  
b. First Name: required field when entering AKA information  
c. Middle Name: optional field

**Note**: You must click the save button at the top of the screen to finalize any changes to the patient record.

**Organization Information Section**

The Organization Information section shows organization-specific information about the patient.

1. Click the **Organization Information** heading to expand the information in that section.

**Medical Record Numbers**

<table>
<thead>
<tr>
<th>Remove MRN</th>
<th>Medical Record Number</th>
<th>Primary</th>
</tr>
</thead>
</table>

*No Medical Record Numbers have been added for this patient.*

**Add Medical Record Number**

Medical Record Number

a. **Status**: Click ACTIVE from the drop-down list if you want this patient to be associated with your organization, meaning he or she is receiving services from you. When you specify a patient as INACTIVE, you make him or her inactive for your organization only.
### Status Options

<table>
<thead>
<tr>
<th>Status Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVE</td>
<td>Patient associated with your organization</td>
</tr>
<tr>
<td>INACTIVE-LOST TO FOLLOW UP</td>
<td>Patient has not responded to follow up contact</td>
</tr>
<tr>
<td>INACTIVE-MOGE</td>
<td>Moved or gone elsewhere</td>
</tr>
<tr>
<td>INACTIVE-MOOSA</td>
<td>Moved out of service area</td>
</tr>
<tr>
<td>INACTIVE-ONE TIME ONLY</td>
<td>Received an immunization once but is not a regular patient</td>
</tr>
<tr>
<td>INACTIVE-OTHER</td>
<td></td>
</tr>
<tr>
<td>INACTIVE-PERMANENTLY (DECEASED)</td>
<td>Patient is deceased.</td>
</tr>
<tr>
<td>INACTIVE-UNKNOWN</td>
<td>An individual made known to an IIS via an electronic interface, perhaps with demographic and historical data, but without that individual’s status specified. This situation can occur because of health insurance companies or Providers providing historical data via an electronic interface. (AIRA Definition)</td>
</tr>
</tbody>
</table>

b. **Provider-(PCP):** Fill in the patient’s primary care physician (PCP) or health care organization from the drop-down list, if provided. This information is used only for reporting.

c. **Tracking Schedule:** This required field defaults to the Advisory Committee on Immunization Practices (ACIP) schedule. This information affects recall and reminder notices and Comprehensive Clinic Assessment Software Application (CoCASA).

d. **Allow Reminder and Recall Contact?** By choosing Yes from the drop-down list you are allowing reminder/recall notices to be sent to this patient when you run the reminder/recall report. If the patient’s parent chooses not to have reminder/recall notices sent, choose No from the drop-down list to exclude the patient from the report.

e. **Medical Record Numbers:** A patient may have numerous patient identifiers associated with him or her; each identifier is organization dependent. To enter a patient identifier, type it in and click the Add Medical Record button. Multiple Medical Record Numbers can be saved and a primary patient identifier can be set by selecting the Primary option button.

---

*Deleting an Existing Identifier*
To delete an existing patient identifier:

1. Click the patient identifier you would like to remove by checking the appropriate box on the left.
2. Click the **Remove Medical Record** button.
3. Click the **Save** button at the top of the page.

*Generation of Reminder and Recall Notices*

When running the reminder/recall report, letters are generated for every patient when the following conditions are met:

- Patient’s status is not set to an INACTIVE status or INACTIVE-PERMANENTLY (DECEASED) on the Organization Information tab
- Allow Reminder and Recall Contact? Indicator on the Organization Information tab is set to Yes.
- Patient has sufficient address information listed in the Address Information section

---

**Note:** Once a status of INACTIVE-PERMANENTLY (DECEASED) has been entered in the Status field, the field can no longer be edited by the organization. To change a status of INACTIVE-PERMANENTLY (DECEASED) contact the CAIR Help Desk.

---

*Patient Information Section*

The Patient Information section gives additional information about the patient.

1. Click the **Patient Information** heading to expand the information in that section.
a. **Race**: Click the patient’s race by selecting the appropriate boxes. Multiple races may be selected.

b. **Ethnicity**: Click the patient’s ethnic background from the dropdown list provided.

c. **Legacy CAIR ID** – This is the legacy CAIR 1 ID. This field will only display for Legacy CAIR 1 patients.

d. **CAIR ID** – This is the CAIR2 ID for the patient and is not editable.

e. **School**: Fill in the patient’s school from the drop-down list, if provided. This information is used only for reporting and must be set up by the organization’s CAIR Super User. For instructions on how to set up the School field, refer to the Managing Schools section in Chapter 8.

f. **Occupation**: Click the patient’s occupation from the dropdown list, if applicable. This field can be used in emergency response situations when certain occupation groups are targeted.

g. **Language Spoken**: Click the primary language spoken by the Patient; this determines the language of the Reminder/Recall letters. English and Spanish are the only options.

h. **Has Patient been Disclosed (IZ/TB)**? This indicator should be set to Yes to verify the patient has been disclosed. A pop up will appear telling the user that they must disclose the patient and the user will not be able to proceed until the patient has been disclosed.
   a. Patients coming in through Data Exchange will be automatically set to Yes

i. **Disclosed Date**: This indicates the date the patient has been disclosed

j. **Disclosed by**: Indicates the provider organization code of the provider that disclosed the patient

k. **Patient Sharing**: This indicates whether the user has consented to share their record or not.
If the indicator is set to No, the patient record will only be viewable by the organization that set the record indicator to No as well as any organization that has administered a dose to that patient.

Effective Date: This is the date the indicator was updated

Updated by: This is the org code that updated the sharing indicator.

Address Information Section

The Address Information section allows you to identify the current address of the patient and view previous addresses.

1. Click the Address Information heading to expand the information in that section.

<table>
<thead>
<tr>
<th>Address Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>[back to top]</td>
</tr>
<tr>
<td>view Patient Address History</td>
</tr>
<tr>
<td>Last Updated 06/20/2016</td>
</tr>
</tbody>
</table>

- No Viable Address: Mark this checkbox if information was sent to the patient and the information was returned as not deliverable.
- Start Date: Fill in the start date of the address using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Click the OK button to enter the Start Date. This is the Start Date of the patient’s New Address.
- Street Address: Street Address of the patient.
- Other Address: Additional address information - a suite number or apartment number could be entered here.
- P.O. Box: Post office box of the patient.
- Zip: Zip code of the patient.
- +4: Extended Zip code numbers of the patient if available.
- City: City (or town) of the patient’s address.
- State: State.
- County: County.
- Phone Number: Phone Number.
1. **Extension**: Phone extension if applicable
   
   m. **Email**: Patient’s email address

2. Clicking **View Patient Address History** will present a window with the patient’s address history, if available.

**Responsible Persons Section**

The Responsible Persons section allows you to identify patient emergency contact information. The Reminder/Recall reports feature can also utilize the Responsible Persons information. The only required fields under this section are the Last Name, First Name, and Relationship fields.

Click the **Responsible Persons** heading to expand the information in that section.

To edit an existing responsible person:

1. Click the **Review** radio button next to the name of the person you wish to edit.
2. Click the **Review** button.
3. Change or add information for the fields listed.
4. Click the **Apply Changes** button.
5. Click the **Save** button at the top of the screen.
6. To enter a new responsible person, click the **Add New** button, and then enter information into the following fields:
   a. **Last Name**: required field
   b. **First Name**: required field
   c. **Middle Name**: optional
   d. **Relationship**: required field
e. **Phone Number:** responsible person’s telephone number, including the area code
f. **Extension:** responsible person’s extension to the above telephone number, if any
g. **Email:** responsible person’s Email address
h. **Street Address:** responsible person’s street address
i. **Other Address:** responsible person’s additional address information - an apartment number could be entered here
j. **P.O. Box:** responsible person’s post office box, or mailing address, if different from the street address.
k. **City:** city or town.
l. **State:** state
m. **ZIP:** ZIP code
n. **+4:** +4 code in this field if known.

7. To enter a new responsible person and save the information you entered in the Responsible Person Listing, or to view the next responsible person’s record, click the **Save** button.

8. To clear existing information and enter a new responsible person, click the **Add New** button.

**Deleting an Existing Responsible Person Listing**

1. Select the **Remove** check box next to the record you wish to delete on the Responsible Person Listing table.
2. Click the **Remove** button.
3. Click the **Save** button at the top of the screen.

**Patient Comments Section**

The Patient Comments section allows you to enter immunization-related comments, such as contraindication information for a patient. The patient comments list is derived from a pre-selected CDC-standardized list and is displayed in drop-down list form.

Although the Start Date is not a required field, a start date must be entered with a contraindication comment in order to properly interact with the immunization schedule for the specified vaccine group. If a start date is not entered, the contraindicated vaccine group will still be recommended.

The patient comments are visible at the top of the Immunization History and Edit Immunization pages and the Patient Immunization Records. When using the Print button on the Immunization History page, the comments are displayed on separate lines in the Comments box.

1. Click the **Patient Comments** heading to expand the information in that section.
2. Click the appropriate comment/contraindication from the Patient Comment drop-down list.
3. Enter the date to which the comment refers in the Start Date field. Complete the field using the MM/DD/YYYY format or use the pop-up calendar. Click the OK button.
4. If applicable, enter the date to which the comment ends in the End Date field. Complete the field using the MM/DD/YYYY format, or use the pop-up calendar. Click the OK button.
5. To enter the comment into the Patient Comments Listing, click the Add Comment button.
6. Click the Save button at the top of the page.

**Immunity Comments**

Immunity comments are linked to vaccine group recommendations. If a patient has an immunity comment and a Start Date is specified, a recommendation for that vaccine group will not display on the patient’s record.

**Patient Refusal of Vaccine Comments**

CAIR users should enter refusal comments with appropriate Start Dates to document vaccine refusal. This information will help other providers understand why a vaccine group might be overdue for a particular patient in CAIR. Refusal of vaccine will not affect the Forecaster.

**Deleting an Existing Comment**

1. Select the Remove check box next to the comment you wish to delete on the Patient Comment Listing table.
2. Click the Remove button.
3. Click the Save button.

**Patient Notes Section**

The Patient Notes section allows you to enter notes for a patient that may be useful to other clinicians.

1. Click the Patient Notes heading to expand the information in that section.
2. Enter Text of Note: Enter text up to 4,000 characters in the text box.
3. Click the Save button at the top of the page.

Notes cannot be removed by users. To remove a note, contact the CAIR Help Desk.

Saving Patient Information

There are several ways to save information on the Demographic/Enter New Patient pages:

**Save:** When clicked, the Save button at the top of the page will save all information fields within each section: Personal Information, Patient AKA, Organization Information, Patient Information, Address Information, Responsible Persons, Patient Comments, and Patients Notes. Once the patient data is saved the message “Patient record successfully saved” will appear at the top of the Personal Information header.

**History/Recommend:** As with the Save button, the History/Recommend button will save all information fields. Once the information is saved the patient’s Immunization History page will display.

**Reports:** As with the Save button, the Reports button will save all information fields. Once the information is saved, the Reports Available for this Patient page will display, so that a report may be generated for the patient. Refer to the Reports and Forms, chapter 12, for more information on reports.

**Cancel:** When clicked, the Cancel button clears all entered information and does not save to CAIR. The Find Patient or Enter New Patient page is displayed.
Deduplication of Patient Records

After you enter a new patient and click one of the buttons that will save the data, CAIR initiates a process that ensures that the patient information you entered does not duplicate a patient that already exists.

If, after attempting to save a new patient, you receive a message box titled “Patient Match Detected”, CAIR has determined that the patient you are attempting to save may already exist in the database. A table below the message box will contain one or more names of potential matches. Click each last name to display his or her information. CAIR will identify matching patients even if the patient has had a name change; therefore, if you do receive a list of potential matches, click the link(s) to determine whether one of the links matches your patient’s record. Review Address, Responsible Persons, and any other information you have to identify matching data.

If you do not find a match for your patient after reviewing all the related names, click the Create New Patient button. A confirmation box will appear; click the OK button. Be aware that if you do override the listed matches and create a duplicate record for a patient, it will be difficult to manage the patient’s immunization and personal information; the registry will lose its accuracy and efficiency. If you identify possible duplicate patient records, you should call the CAIR Help Desk immediately.

Countermeasure and Response Administration Module (CRA)

Note: In the event of a public health emergency, CAIR may be used to track the administration of vaccine. In some instances, specific groups may be identified as being at higher risk than the general population and targeted as priority groups to receive the vaccination first.

CRA Event Information Section

If your organization is selected for an event, the CRA Event Information section will be displayed below the Patient Information section of the Demographic page. The CRA Event Information
section is used to collect Public Health data during a pandemic response event or preparedness exercise. During an ongoing event, the CRA Event Information section will be displayed on the Edit/Enter New Patient page. Based on candidate screening, select the appropriate priority group category for each patient.

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Influenza By Age Group</td>
<td>01/01/2010</td>
<td></td>
</tr>
<tr>
<td>Age Group:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Age will be calculated at the time of Vaccination and included in aggregate reporting.</td>
<td></td>
</tr>
<tr>
<td>Influenza By Priority Group</td>
<td>09/30/2010</td>
<td>12/31/2010</td>
</tr>
<tr>
<td>Priority Group:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pick a Priority Group</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Effective Events are displayed.
- The Age Group is not required and will be calculated at the time of vaccination.
- The Priority Group Value (Code) is displayed in the drop-down list. When selected, a full description of the selected priority group will be listed to the right of the drop-down list.
Chapter 9 Managing Immunizations and TB

In this chapter:

- Viewing Patient Immunization Information
- Entering Immunizations
- Editing Immunizations
- Entering TB Test Results
- Countermeasure and Response Administration (CRA)
CAIR allows you to view and manage historical immunization information and add new immunizations for a patient. CAIR also recommends immunizations based on the ACIP tracking schedule. To access immunization information for a specific patient:

1. Click **Patient Search** under the Immunizations section of the menu panel. This will bring up the Patient Search page. For information on finding patients, refer to Chapter 10, Managing Patients. Once a patient is retrieved, the patient’s Immunization Record page displays.

**Viewing Patient Immunization Information**

The Immunization Record page holds a large amount of information on each patient in CAIR. The page has three sections: Patient Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule.

**Patient Information**

The Patient Information section at the top of the Immunization Record page displays information on the patient, such as name, DOB, gender, Tracking Schedule, Patient ID, address, phone, and a scrollable list of comments. Use this information to verify that the patient indicated is the patient for whom you were searching. To edit this information, Click the Edit Patient button and refer to the Editing/Entering Patient Information section in Chapter 10, Managing Patients.

<table>
<thead>
<tr>
<th>Patient Name (First - MI - Last)</th>
<th>DOB</th>
<th>Gender</th>
<th>Tracking Schedule</th>
<th>Medical Record Number</th>
<th>CAIR ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>MICKEY MOUSE</td>
<td>06/24/2016</td>
<td>M</td>
<td>ACIP</td>
<td></td>
<td>4568</td>
</tr>
</tbody>
</table>

Between the Patient Information section and the Immunization Record section, the patient’s exact age is shown in a solid blue field. The age also displays on the printable version of this page.

**Immunization Record**

This table lists all the immunizations the patient has received to date that have been entered into CAIR. Immunizations are listed alphabetically by vaccine group and ordered by Date Administered.
**Immunization Record**

<table>
<thead>
<tr>
<th>Vaccine Group</th>
<th>Date Admin</th>
<th>Series</th>
<th>Vaccine [Trade Name]</th>
<th>Dose</th>
<th>Owned?</th>
<th>Reaction</th>
<th>Hist?</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTP/aP</td>
<td>03/02/2008</td>
<td>1 of 5</td>
<td>DTaP, NOS</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HepB</td>
<td>01/02/2008</td>
<td>1 of 3</td>
<td>HepB, NOS [HepB ®]</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotavirus</td>
<td>03/02/2008</td>
<td>2 of 3</td>
<td>HepB, NOS [HepB ®]</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Td/Tdap</td>
<td>03/02/2008</td>
<td>1 of 3</td>
<td>Rotavirus, NOS</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Vaccine Group:**

the vaccine group name

**Date Administered:**

The date the patient was given the vaccine. To view the tracking schedule information for the selected immunization, or an explanation of why an immunization is not valid or appropriate, click this date.

**Series:**

Denotes the sequence number within the immunization series. A vaccine may show as invalid because the patient was not old enough to receive it or not enough time has elapsed between doses.

"Partial Dose" will display if the shot is flagged as a partial dosage.

**Trade Name:**

The manufacturer’s trade name of the vaccine

**Dose:**

Indicates whether full, half or multiple doses were administered to the patient. If the Dose field is blank, assume that the default “full” dose was administered.

**Owned?:**

If the value in the owned column is blank, the immunization data is owned by your organization. This is a result of either manual data entry of this information or having sent it via data exchange. This only indicates the organization submitting the data; it has nothing to do with the organization that administered the shot to the patient.

“If the value in the Owned?” column is “No”, the immunization data is not owned by your organization. This indicates that your organization did not enter the shot information into CAIR. Click “No” to display who owns the shot information.

**Reaction:**

If this column indicates “Yes” and appears in red, this means a reaction to a vaccine was recorded. To view the patient’s reaction, Click the “Yes” link in the Reaction column or Click the notepad icon in the “Edit” column.
Hist?: If this column indicates “Yes”, this record is historical, meaning the immunization was administered by a provider at another organization, not the organization that owns the data. If this column is blank, this indicates the immunization was administered by the organization that owns the data (i.e. entered the data into CAIR).

Edit: When you click the notepad icon in this column, you will be able to edit some fields for the recorded immunization using the Edit Immunization page, as long as the immunization is owned by your organization or is historical. You will also be able to see more details about the immunization, including vaccine lot number and VFC status (if applicable). Click the Edit button to enter a reaction to the immunization or mark it as a subpotent dose. Details on editing immunizations are covered in more detail later in this chapter.

Note: Owned vs. Not Owned Immunizations

A single provider does not own any of the patients within CAIR, but an organization does own the immunization data it enters into the system. If the Owned column on the Immunization Record table shows a “No” for one or more vaccines, this indicates that another organization entered the vaccine information and is attesting to the validity of the information.

Any provider may edit a historical immunization, but “new” or non-historical shots may only be edited by the organization that administered the vaccine and entered the data in CAIR. The exception is that any user can enter a reaction to any immunization or mark it as a subpotent dose.

Validation of Combination Vaccines

CAIR validates each vaccine group component separately when recording combination vaccines. For example, if Comvax, which is a combination of Hib and Hep B was administered, and only one component is valid, that component will be treated as if it were a single vaccine and validated. The other component will be displayed as “Not Valid”. The component that is not valid will not be counted in series.

Vaccines Recommended by Selected Tracking Schedule
This table, known as the Forecaster, lists all vaccines recommended by the ACIP tracking schedule associated with the patient. Immunizations are listed alphabetically.

<table>
<thead>
<tr>
<th>Select</th>
<th>Vaccine Group</th>
<th>Vaccine</th>
<th>Earliest Date</th>
<th>Recommended Date</th>
<th>Past Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DTP, NOS</td>
<td>03/06/2008</td>
<td>05/02/2008</td>
<td>06/02/2008</td>
<td></td>
</tr>
<tr>
<td></td>
<td>HepA, NOS</td>
<td>01/02/2009</td>
<td>01/02/2009</td>
<td>08/02/2009</td>
<td></td>
</tr>
<tr>
<td></td>
<td>HepB, NOS</td>
<td>Complete</td>
<td>Complete</td>
<td>Complete</td>
<td>Complete</td>
</tr>
<tr>
<td></td>
<td>Hib, NOS</td>
<td>04/02/2008</td>
<td>04/02/2008</td>
<td>04/02/2008</td>
<td>04/02/2008</td>
</tr>
<tr>
<td></td>
<td>Influenza, NOS</td>
<td>07/02/2008</td>
<td>08/01/2009</td>
<td>08/02/2008</td>
<td>08/02/2008</td>
</tr>
<tr>
<td></td>
<td>MMR</td>
<td>01/02/2009</td>
<td>01/02/2009</td>
<td>05/02/2009</td>
<td>05/02/2009</td>
</tr>
<tr>
<td></td>
<td>PneumoConjugate</td>
<td>01/02/2010</td>
<td>01/02/2010</td>
<td>01/02/2010</td>
<td>01/02/2010</td>
</tr>
<tr>
<td></td>
<td>Polio, NOS</td>
<td>02/13/2008</td>
<td>03/02/2008</td>
<td>04/02/2008</td>
<td>04/02/2008</td>
</tr>
<tr>
<td></td>
<td>Rotavirus, NOS</td>
<td>Maximum Age Exceeded</td>
<td>01/02/2009</td>
<td>01/02/2009</td>
<td>05/02/2009</td>
</tr>
</tbody>
</table>

**Select:** allows users to manually check inclusion in the Vaccines Recommended section. When the Add Selected button is clicked, the Enter New Immunizations page will open with the check-marked selections displayed.

**Vaccine Group:** Lists the vaccine group name. To view the tracking schedule information for the selected immunization, click the vaccine group name.

**Vaccine:** lists the vaccine name

**Earliest Date:** the earliest date that the patient may receive the vaccine

**Recommended Date:** the recommended date that the patient should receive the vaccine

**Past Due Date:** The date at which the patient is past due for the immunization.

**Immunization Color Coding**

The dates found in the Vaccines Recommended by Selected Tracking Schedule table are shaded with color for emphasis. For a detailed listing of Color definitions, click the online help icon on the Immunization Record page. The colors applied to the dates within the columns are defined as follows:
Green: Color that will fill the background for the Vaccine Group and Date columns when a dose in that family is recommended or past due.

Gray: Vaccine statuses that will show gray color: Complete, Contraindicated, Maximum Age Exceeded, Immunity, and Medical Exemption.

Other Features on the Immunization Record Page

The Immunization Record page contains links to other CAIR functions:

Edit Patient: Clicking this button will return you to the Demographic page for the patient

Reports: Clicking this button will bring you to the Reports Available for This Patient page. You may generate Patient-specific reports. Refer to Forms and Reports in Chapter 12 of this manual for more information.

Print Record: Clicking this button will display the patient’s immunization information without the top or side CAIR menus. To print this page, Click the printer icon on your browser’s tool bar or click File, Print and click OK. Click the browser’s Back button to return to the Patient Immunization Information page.

Print Confidential Record: Clicking on this button will display the patient’s immunization information without top or side CAIR menus and without confidential patient information. To print this window, Click the printer icon on your browser or click File, Print, and Click OK. Click your browser’s Back button to return to the Patient Immunization Information page.

Entering Immunizations
To add new immunizations:

1. To enter immunizations using the Add Selected button in the bottom right hand corner of the page, click the boxes of the appropriate immunizations under the Vaccines Recommended section and click the Add Selected button.
2. To enter immunizations without using the Add Selected button, click the Add New Imms button to display the Enter New Immunization page.

3. To add immunizations from CAIR Inventory, click the check box From CAIR Inventory. This will deduct the immunization from your vaccine inventory.

- Click a date for the Date Administered field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. drop-down
- You may choose an Administered By value for new immunizations by clicking the drop-down list in the Enter New Immunization section. You will be able to edit these fields for each immunization on the Record Immunizations page. These fields are set up and managed by the Super User of CAIR for your organization. Refer to “Managing Clinicians” (Chapter 8).
- Remove box: click when removing an immunization.
- Immunization: click from the drop-down list. This will uncheck the Remove box.
- Vaccine Eligibility: click the appropriate vaccine eligibility for this patient’s immunization. The vaccine eligibility drop-down list will display according to organization type.
- Trade Name-Lot #-Funding Source Exp. Date: click or enter the appropriate Trade-Name-Lot #-Funding Source Exp. Date. (If using vaccine from Inventory, the trade names and lot numbers will be listed in the drop-down menu.)
- Body Site: Is required, click the appropriate body site for the immunization.
- Route: The Route will default to the route associated to the Trade Name if it is known.
- Dose: Click the appropriate dose for the immunization. The dose will default to full.

Repeat these steps for each new immunization you are entering.

- New Patient Comments: If necessary, select the appropriate comment from the drop-down list. Add an “Applies-To Date” by using the MM/DD/YYYY format, or
use the pop-up calendar by clicking the calendar icon to the right of the field. Click the Add button to add patient comment to the record. For more information on Patient Comments, see Managing Patients, Chapter 10.

- Click the Save button to save your immunization entry.

To Add Historical Immunizations:

1. Click the **Add Historical Imms** button to display the Enter Historical Immunizations page.
2. Enter Doses 1 – 5 for immunizations being historically recorded by using the MM/DD/YYYY format. For those immunizations not being recorded, leave the box blank.
3. Click the **Enter Details** button to enter the Trade Name, Lot Number, Provider Org, and Source of Immunization.
4. Click the **Save** button to save your immunization entry.
Note: At the bottom of the Immunization Details Entry page, default VIS dates will be displayed for each new immunization entered.

Duplicate Immunizations

CAIR does not allow duplicate immunizations to be entered for a patient. If you attempt to enter an immunization for a patient given within two days before or after an existing immunization with the same trade name, you will receive the message, “Possible duplicate immunizations exist. Modify or delete your entries.” CAIR will then allow you to change or delete the entry(s) in question.

If you receive a duplicate immunizations override warning:

- In the Duplicate Immunization Override warning dialog box, review all immunizations to determine whether there are any duplicates.
- If the immunization(s) you entered need to be removed or edited, click “Make Edits”.
- At the Enter New Immunization or Enter Historical Immunizations page, make changes or remove immunizations as needed. Click the OK button.

Note: The following scenarios explain how CAIR overrides duplicate immunization records:

- If there is a historical immunization on file and the same immunization is entered as administered from CAIR inventory or data exchange, no warning message will appear; instead, it processes the new immunization and removes the historical immunization.
- If there is a historical immunization on file and a matching historical immunization is entered, a warning message will appear. The user then has the choice to cancel the new immunization or save it anyway (adding a duplicate immunization). The user would need to explicitly delete the historical immunization to remove the duplicate records.
Applying a Prerequisite Override to a Patient’s Immunization

A prerequisite override is a command within a tracking schedule that allows users to override a prerequisite vaccine once a patient reaches a certain age. A prerequisite override is not automatically applied to an individual patient’s immunization record. To apply a prerequisite override to an immunization:

1. Enter the immunization as described in the Entering Immunizations section of this chapter. You may notice that, as in the case of Td, the immunization will appear on the immunization history as one of a series, when in fact it is a booster immunization. The next two steps will correct this.
2. Follow Steps 1-3 in the Editing Owned Immunization from the Inventory section of this chapter.
3. In the field marked Disregard Primary Series, click Yes. This field will only appear open if the conditions (the chosen tracking schedule has an override on the vaccine and the age of the patient is greater than or equal to the override age) meet those of the prerequisite override.
4. Click Save.

Editing Immunizations

Editing or Deleting Historical Immunizations

To edit or delete a historical immunization:

1. On the Immunization Record table, select the historical vaccine record you wish to edit by clicking the vaccine’s notepad icon in the “Edit” column.
2. On the Edit Historical Immunization page, you may edit information for the Vaccine Lot Number, Subpotent Dose, Date Provided, Provider Organization Name, Source of Immunization fields; you may also select the box for Disregard Primary Series.

3. To record a reaction to a vaccine, check the box to the left of the reaction in the Reactions to Immunization section.

4. To delete the historical immunization, click the Delete button.

5. Click the Save button.
**Editing Owned Immunizations**

An immunization that is non-historical is one that was given out of an organization’s inventory or submitted via electronic data exchange as administered. You will not be able to edit non-historical immunizations that are owned by another organization.

To edit an immunization record that is an owned immunization, administered by your organization:

1. On the Immunization History table, select the vaccine record you wish to edit by clicking the vaccine’s notepad icon in the Edit column.

2. To indicate a partial dosage, check the **Subpotent Dose** checkbox. For example, check this box if a partial dosage was administered because the needle broke or was removed too soon.

3. Update information in the Date Provided, Vaccine Eligibility, Ordering Authority, Administered By, Body Site and/or Administered Route fields on the Edit Immunization page.

4. To indicate a Vaccine Information Statement (VIS) date other than the most current (default) date, click an alternate date from the drop-down list.

5. To record a reaction to the immunization, check the box next to the applicable reaction.

6. Click the **Save** button.

**Deleting Owned Immunizations**

Note that you will not be able to delete non-historical immunizations that are owned by another organization.
1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine’s notebook icon 🖼️ in the Edit column.
2. At the Edit Immunization page, click the **Delete** button.
3. Click the **OK** button in the confirmation box.

**TB Tests and X-RAYS**

The Immunization History has the TB Test History Tab next to the Immunization History Tab. The user can add the 3 different types of TB tests, add X-Ray Tests and generate the TB Report at the patient level.

### Patient Information

<table>
<thead>
<tr>
<th>Patient Name (First - MI - Last)</th>
<th>DOB</th>
<th>Gender</th>
<th>Tracking Schedule</th>
<th>Patient ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>MIKE TEST PATIENT</td>
<td>09/25/2007</td>
<td>M</td>
<td>ACIP</td>
<td>1234567</td>
</tr>
</tbody>
</table>

**Address**

1280 PATIENT ST, SAN FRANCISCO, CA 90210

**Phone**

/ 

**Comments**

{1 of 1} - 07/15/2016 ~ Allergic to Ampicillin

1. The user will click the Add TB Test Button.

### TB Test History

<table>
<thead>
<tr>
<th>Date Given</th>
<th>Type</th>
<th>Given By</th>
<th>Date Read</th>
<th>Determination By</th>
<th>Interpretation</th>
<th>Provider ID</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/21/2016</td>
<td>PPD-Mantoux</td>
<td>MIKE LOULA</td>
<td>07/21/2016</td>
<td></td>
<td>Positive</td>
<td>IRPH</td>
<td>X</td>
</tr>
<tr>
<td>07/29/2016</td>
<td>X-ray</td>
<td>MIKE</td>
<td></td>
<td></td>
<td>Abnormal</td>
<td>IRPH</td>
<td>X</td>
</tr>
</tbody>
</table>

2. The user will have the option to select any of the three types of TB tests.
   a. Each type of Test has a different set of fields that need to be filled out.

**PPD-Mantoux fields**
QuantiFERON fields

T-spot fields
3. The fields are either pre-determined pick lists or free text fields.
4. The User also can add an X-Ray to the patient History
5. The user will click Add X-ray

6. The User will select from the pick lists or add free text to fill in the fields.

7. The user can also generate the TB History Report at the patient level by clicking on the TB Report button.
Patient Information

<table>
<thead>
<tr>
<th>Patient Name (First - MI - Last)</th>
<th>DOB</th>
<th>Gender</th>
<th>Tracking Schedule</th>
<th>Patient ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>MIKE TEST PATIENT</td>
<td>09/25/2007</td>
<td>M</td>
<td>ACIP</td>
<td>1234567</td>
</tr>
<tr>
<td>Address</td>
<td>1280 PATIENT ST, SAN FRANCISCO, CA 90210</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Phone/Cell</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>{1 of 1} .. 07/15/2016 ~ Allergic to Ampicillin</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Current Age: 8 years, 10 months, 10 days

Patient Notes (0) [view or update notes]

Immunization History

TB Test History

<table>
<thead>
<tr>
<th>Date Given</th>
<th>Type</th>
<th>Given By</th>
<th>Date Read</th>
<th>Determination By</th>
<th>Interpretation</th>
<th>Provider ID</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/21/2016</td>
<td>PPD-Mantoux</td>
<td>MIKE LOULA</td>
<td>07/21/2016</td>
<td></td>
<td>Positive</td>
<td>IRPH</td>
<td></td>
</tr>
<tr>
<td>07/29/2016</td>
<td>X-ray</td>
<td>MIKE LOULA</td>
<td>07/21/2016</td>
<td>MIKE</td>
<td>Abnormal</td>
<td>IRPH</td>
<td></td>
</tr>
</tbody>
</table>

TB History Report

TB History Report

Name: PATIENT, MIKE, TEST
DOB: 09/25/2007 M: M
Registry: CAIR
CAIR ID: 33841
Medical Record #: 1234567
VFC Eligibility: 317 Eligible LHD or HDAS Only
Address: 1280 PATIENT ST, SAN FRANCISCO, CA 90210
Phone: () -

Active: Y
Share Data: Y
Disclosed By: IR Physicians on 06/21/2016
Date Printed: 08/04/2016
Printed For: IRPH

TB Test History:

<table>
<thead>
<tr>
<th>Type</th>
<th>Date Given</th>
<th>Given by</th>
<th>Date read</th>
<th>Read by</th>
<th>Interpretation</th>
<th>Specific Results</th>
<th>ProvOp. Col.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chest X-Ray</td>
<td>07/25/2016</td>
<td>MIKE LOULA</td>
<td></td>
<td></td>
<td>Abnormal</td>
<td>Free of communicable tuberculosis</td>
<td>IRPH</td>
</tr>
<tr>
<td>PPD-Mantoux</td>
<td>07/31/2016</td>
<td>MIKE LOULA</td>
<td>07/21/2016</td>
<td>MIKE LOULA</td>
<td>Positive</td>
<td>Induration: 2 mm Comments: Mike</td>
<td>IRPH</td>
</tr>
</tbody>
</table>
Countermeasure and Response Administration (CRA)

In the event of a public health emergency, CAIR may be used to track the administration of vaccine. In some cases, specific patient groups may be identified as being at higher risk than the general population and targeted to receive the vaccination first. These groups are called priority groups.

The CRA Event Information section is used to collect public health data during a pandemic event or preparedness exercise (such as the response event to a pandemic influenza outbreak.). If your organization is selected for an event, then the CRA Event Information section will be displayed on the Record Immunizations page. Based on candidate screening, click the appropriate priority group category for each patient.
Chapter 10 Forms and Reports

In this chapter:

- Forms Tab
- Patient Level Reports
- Immunization History Report
- Immunizations Needed Report
- Vaccine Administration Record
- Ad Hoc Reports
- Assessment Report
- Benchmark Report
- Doses Administered
- Group Patients
- Reminder/Recall
- Vaccine Eligibility
- Billing Report
- Provider Report
- Vaccine Accountability Report
Forms Tab
The Forms tab at the top of the CAIR web page gives users access to several CAIR related forms.

To access forms, click the Forms tab in the top menu bar.

Patient Level Reports
For all patients in CAIR, you may generate the following reports from the Patient Reports Screen:

- Immunization History Report
- Immunizations Needed/Routing Slip
- Yellow Card Report

Immunization History Report
The Immunization History Report displays demographics, contact information, and a detailed summary of the patient’s immunization history. This report will typically be used as an official school record. This report should be provided to parents and guardians, as requested. To generate the report, follow these steps:

1. From a patient’s Manage Patient screen or Manage Immunizations screen, click the Reports button.
2. At the Reports Available for this Patient section, click Immunization History Report, this is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the OK button in the Print dialog box.

5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

**Immunizations Needed/Routing Slip Report**

The Immunizations Needed/Routing Slip report displays demographics, contact information, immunization record, and immunizations recommended by date according to the tracking schedule assigned to the patient. This report can be provided to parents and guardians for their records and helps to identify upcoming immunizations for their children. In addition, it provides a place for the next appointment date and organization phone number. To generate the report, follow these steps:

1. From a patient’s Manage Patient screen or Manage Immunizations screen, click Reports.
2. At the Reports Available for this Patient section, click **Immunizations Needed/Routing Slip**, which is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the OK button in the Print dialog box.
5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

Yellow Card Report
The Yellow Card Report is a patient level report giving patient demographic and immunization history as well as TB History. To generate the report, follow these steps:

1. From a patient’s Manage Patient screen or Manage Immunizations screen, click Reports.
2. At the Reports Available for this Patient section, click Yellow Card Report.
**Yellow Card**

### Immunization Record

<table>
<thead>
<tr>
<th>VACCINE</th>
<th>DATE GIVEN</th>
<th>DOCTOR OFFICE OR CLINIC</th>
<th>DATE NEXT DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polio</td>
<td>12/17/2007</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hib</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**MMR**

<table>
<thead>
<tr>
<th>DOCTOR OFFICE OR CLINIC</th>
<th>DATE NEXT DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**HEPB**

<table>
<thead>
<tr>
<th>DOCTOR OFFICE OR CLINIC</th>
<th>DATE NEXT DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Pneumo/Conjugate**

**Pneumo/Polysaccharide**

**VZV**

<table>
<thead>
<tr>
<th>DOCTOR OFFICE OR CLINIC</th>
<th>DATE NEXT DUE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Forms and Reports**

**CAIR**

**85**
1. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
2. To print the report, click the printer icon on the Adobe® toolbar. Click the OK button in the Print dialog box.
3. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Yellow Card report window.

**Ad Hoc Reports**

The Ad Hoc reports function in CAIR allows the user to create one time use customized reports. Filters within the Ad Hoc reporting function help to narrow a search by date, vaccine group, ethnicity, and other factors. The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected patients, the other type produces counts, either of patients or of immunizations. The table below defines terms used in Ad Hoc reports.

<table>
<thead>
<tr>
<th>Items to filter on</th>
<th>Patient Factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Indian or Alaska Native</td>
<td>Whether the patient is an American Indian or Alaska Native</td>
</tr>
<tr>
<td>Area Code</td>
<td>Area Code in which the patient lives</td>
</tr>
<tr>
<td>Asian</td>
<td>Whether the patient is Asian</td>
</tr>
<tr>
<td>Birth County</td>
<td>County of birth</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Date of birth</td>
</tr>
<tr>
<td>Black or African-American</td>
<td>Whether the patient is Black or African-American</td>
</tr>
</tbody>
</table>
### Items to filter on

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>City</td>
<td>Current city in which the patient resides</td>
</tr>
<tr>
<td>Comment</td>
<td>Any comments associated with the patient record</td>
</tr>
<tr>
<td>Consent Indicator</td>
<td></td>
</tr>
<tr>
<td>County of Residence</td>
<td>Current county in which the patient resides</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Ethnicity of patient</td>
</tr>
<tr>
<td>Gender</td>
<td>Gender of patient</td>
</tr>
<tr>
<td>Has 2 or more immunizations</td>
<td>Whether the patient has two or more immunizations</td>
</tr>
<tr>
<td>Language preferences</td>
<td>Language preferred by the patient</td>
</tr>
<tr>
<td>Mother’s HBsAg Status</td>
<td></td>
</tr>
<tr>
<td>Native Hawaiian or Other Pacific Islander</td>
<td>Whether the patient is Native Hawaiian or an Other Pacific Islander</td>
</tr>
<tr>
<td>Other Race</td>
<td>Whether the patient is of a race not specified by the system, leading them to choose Other</td>
</tr>
<tr>
<td>Patient ID</td>
<td>The Patient ID within CAIR</td>
</tr>
<tr>
<td>Phone number</td>
<td>Current phone number</td>
</tr>
<tr>
<td>Primary Address Indicator</td>
<td>Whether the patient has a primary address in CAIR</td>
</tr>
<tr>
<td>Primary Care physician</td>
<td>Patient’s primary care physician</td>
</tr>
<tr>
<td>Relationship to patient</td>
<td>The Responsible Person’s relationship to patient</td>
</tr>
<tr>
<td>School</td>
<td>Current school the patient attends</td>
</tr>
<tr>
<td>State</td>
<td>Current state of residence</td>
</tr>
<tr>
<td>White</td>
<td>Whether the patient is White/Caucasian</td>
</tr>
<tr>
<td>Zip code</td>
<td>Zip Code in which the patient current resides</td>
</tr>
</tbody>
</table>

### Immunization Factors

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administering clinician</td>
<td>Clinician who administered the immunization</td>
</tr>
<tr>
<td>Clinic site</td>
<td>Clinic site at which the immunization was administered</td>
</tr>
<tr>
<td>Sub potent</td>
<td>Will filter by sub potent immunizations that were given.</td>
</tr>
<tr>
<td>Display Inadvertent Vaccine Group</td>
<td></td>
</tr>
<tr>
<td>From Inventory</td>
<td>Whether the immunization was from inventory in CAIR</td>
</tr>
<tr>
<td>Trade Name</td>
<td>Vaccine’s trade name</td>
</tr>
<tr>
<td>Vaccination date</td>
<td>Date on which the immunization was administered</td>
</tr>
<tr>
<td>Vaccine</td>
<td>Vaccine administered</td>
</tr>
<tr>
<td>Vaccine Eligibility</td>
<td>Whether the immunization was VFC eligible</td>
</tr>
<tr>
<td>Vaccine Lot Other Inv</td>
<td>Vaccine from non-inventoried lot</td>
</tr>
<tr>
<td>Vaccine Group</td>
<td>Group in which the vaccine is labeled</td>
</tr>
<tr>
<td>Vaccine Lot</td>
<td>The log from which the vaccine was aliquoted</td>
</tr>
<tr>
<td>Valid immunization</td>
<td>Whether the immunization is valid</td>
</tr>
<tr>
<td>BEFORE</td>
<td>Used for dates</td>
</tr>
</tbody>
</table>
Comparisons

<table>
<thead>
<tr>
<th>Comparison</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEFORE</td>
<td>Used for dates</td>
</tr>
<tr>
<td>EQUALS</td>
<td>Same in comparison</td>
</tr>
<tr>
<td>NOT EQUAL TO</td>
<td>Not the same in comparison</td>
</tr>
<tr>
<td>AFTER</td>
<td>Used for dates</td>
</tr>
<tr>
<td>BETWEEN</td>
<td>Used for dates</td>
</tr>
<tr>
<td>IS</td>
<td>Exact equivalent</td>
</tr>
<tr>
<td>IS NOT</td>
<td>Not the equivalent</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit an applied filter</td>
</tr>
<tr>
<td>Remove</td>
<td>Remove an applied filter</td>
</tr>
<tr>
<td>And/Or</td>
<td>Changes the operator between ‘And’ and ‘Or’ depending upon which is initially selected. Requires at least two filters to be applied.</td>
</tr>
<tr>
<td>Group</td>
<td>Groups filtered sections together in the report</td>
</tr>
<tr>
<td>Ungroup</td>
<td>Removes grouped filtered sections</td>
</tr>
</tbody>
</table>

Notes: Patients whose information is added or changed on the day the report is run will not appear in the results until at most 30 minutes after data was entered.

Ad Hoc reports run against all patients associated with your organization. To disassociate a patient from your organization you must change their status in the organization information section of the patient’s record.

Ad Hoc List Reports

To produce a list of information about selected patients:

1. Click **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking the desired items from the left column (for example, Patient Last Name) or by highlighting the item and clicking **Add**. This will copy the item to the right column and add it to your report.
3. Select the single item by which you would like to have the report sorted and click the sort order (first-to-last or last-to-first). Note: Sorting the report will increase the time it takes to process it.
4. Under Item to filter on, select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.

5. Filters in CAIR are used to narrow information down so that it answers a user's query. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make; for example, Between =

6. Under Value to compare to, either choose a value from the drop down list in the left field and/or enter a date in the right field.

7. Under And, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.

8. Click the Add/Save Edit button. Repeat steps 4-8 for each item you wish to filter.
9. When finished adding filter items:
   a. Within the Selected Filters section, to change AND to OR, highlight ‘AND’ and click the ‘And/Or’ button. Alternatively, can also be switched to AND by following the same process.
   b. Group them together by highlighting two filter statements and clicking the Group button. This groups the filters together in the report, which is indicated by wrapping the lines in parenthesis.
   c. Highlight a grouped statement and click the Ungroup button to ungroup it. This removes the filters from being grouped together in the report.
   d. Highlight a statement and click the Remove button to remove it from the selected filters.
   e. Highlight a statement and click the Edit button to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click the Add/Save Edit button.

10. Click the Generate button. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Count Report

To produce a count of selected patients or immunizations:

1. Click Ad Hoc Count Report under the Reports section of the menu panel.
2. Select whether Patients or Immunizations will be counted by clicking the appropriate radio button at the top of the screen.
3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and clicking the Add button. This will copy the item to the right column so that it can be used in your report. You can choose a maximum of three factors.

4. Under Item to filter on select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.

5. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make. For example, between is one comparison operator.

6. Under Value to compare to, either choose a value from the drop down list in the left field or enter a beginning date in the right field.

7. Under and, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.

8. Click on Add/Save. Repeat Steps 4-8 for each item you wish to filter.

9. When finished adding filter items, you may do the following:
   a. Group them together by highlighting two filter statements and click Group. This will add parenthesis to indicate that the statements are now grouped.
   b. Change AND to OR by highlighting ‘AND’ and clicking the And/Or button. OR can also be switched to AND by following the same process.
   c. Highlight a grouped statement and click on Ungroup to ungroup it.
   d. Highlight a statement and click on Remove to remove it from the selected filters.
   e. Highlight a statement and click on Edit to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click on Add/Save.

10. Click Generate. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.
Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you click **Generate** on the Ad Hoc Count or Ad Hoc List Report screens. You may also access the status screen by clicking on Ad Hoc Report Status under the Reports section of the menu panel.

   ![Ad Hoc Report Status Table]

1. Click **Refresh** occasionally to check the status of the report. Once the underlined report type appears in blue, click it. The report will display directly on this screen.

2. Export the data as a text file, spreadsheet, or PDF by selecting the appropriate link.

3. If you wish to print the report, click **Print** under the **File** menu within the application (text file, spreadsheet, or Adobe® Reader). In the print dialog box, adjust the print options as necessary, and then click either **Print** or **OK**, depending on the application.

   ![Ad Hoc Report Status Table]

**Note:** Ad hoc reports are retained for 72 hours per organization. CAIR will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.

Assessment Reports

The Assessment Report feature in CAIR provides an analysis of an organization’s immunization coverage rates. The following is a brief overview of the data that are returned on each table within the Assessment Report. Routinely reviewing patient records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage in your organization.

1. Click **Assessment Report** under the Reports section of the menu panel.
2. Select the patient population to be assessed by clicking one of the following:

3. All Patients Associated with <Organization Name>: Choose this option to view immunization data on all patients associated with your organization.

4. Select the age, birth date range, or age range of the patients by choosing one of the following:
   a. Less than 72 months old: Choose this option to return all patients who are 72 months or younger.
   b. Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field. Alternatively, use the calendar icons beside each field to enter the dates.
   c. Age range: Choose this option to enter an age range. Enter the youngest age range in the first field; use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years. You cannot search for patients older than 72 months.
   d. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return an assessment report that counts patients with sufficient refusal comments as being up-to-date.
   e. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the assessment criteria date will be included in the report.
5. Click **Generate**.
6. The Assessment Report Status screen will display. Some reports will automatically generate and will appear in the Job Name – Evaluation Date and Age Range – Evaluation Date Sections. The number of reports that will automatically generate will vary based on the age range of patients assessed.

7. Click **Refresh** occasionally to check on the progress of the reports. When the reports are ready, the job name will appear underlined and in blue text and the status will display as **Complete**.

8. Once reports are complete, you may view the reports that automatically generated, or you may run additional reports. At this screen you may do the following:
9. Select an age from the drop down list provided and click on **Generate** (to the right of the age drop down list). Create an assessment report listing patients for an age-specific benchmark by selecting an age from the drop down list and clicking **Generate**. This report lists the patient’s name, address, telephone number, and the vaccinations that they did or did not
complete or refused by the benchmark age. A patient will show on the report if they missed at least one age-specific benchmark.

10. Click the underlined job name.

11. The report listing patients by benchmark age will have a job name of: (Benchmark Patient Listing) <Organization Name> - <Benchmark Age>.

12. The assessment report will be called: (Assessment Report)<Organization Name> - <Date>.

13. A report listing all patients who have missed a vaccination opportunity will have a job name of: (Missed Opps Patients)<Organization Name>-<Date>.

14. Click an underlined age range to view a listing of patients returned that fall within the specified range. This list will give the name, address, and telephone number for all patients meeting the record criteria. To view patients for all age ranges that meet the criteria, click the All Age Ranges link.

15. The report displays in Adobe Reader® if you clicked one of the report or age range links. To print one of the reports, click on the printer icon on the Adobe® toolbar.

16. Click OK in the Print Dialog box

17. To return to the Assessment Report Status screen, click the Back button in the browser.

---

**Note:** Patients with Refusals

If the option to Assess Patients with Sufficient Refusal History as Covered is selected when the assessment report is run, patients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.

---

**Understanding the Assessment Report**

The following is a brief overview of the data that is returned on each table within the assessment report.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Records Analyzed</th>
<th>Inactive</th>
<th>Records Meeting Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>36-72 Months of Age</td>
<td>50</td>
<td>0</td>
<td>50</td>
</tr>
<tr>
<td>24-35 Months of Age</td>
<td>51</td>
<td>0</td>
<td>51</td>
</tr>
<tr>
<td>12-23 Months of Age</td>
<td>54</td>
<td>0</td>
<td>54</td>
</tr>
<tr>
<td>&lt; 12 Months of Age</td>
<td>46</td>
<td>0</td>
<td>46</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>201</strong></td>
<td>0</td>
<td><strong>201</strong></td>
</tr>
</tbody>
</table>
Age Group: This column displays the age ranges used for evaluation.

Records Analyzed: This column displays the count of selected patients within the age group that are included in this report. This is determined by the age range chosen when generating the report.

Inactive: This column displays the count of selected patients within the age group that are not active in your clinic. Refer to Chapter 10, Managing Patients, for information on marking patients as inactive.

Records Meeting Criteria: This column displays the count of selected patients within the age group who are active in your organization.

Table 2

<table>
<thead>
<tr>
<th>Age (months)</th>
<th>Up-to-Date 1-4 (UTD)</th>
<th>Late 1-4</th>
</tr>
</thead>
<tbody>
<tr>
<td>36-72 months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>72</td>
<td>82.0%</td>
<td>82.0%</td>
</tr>
<tr>
<td>24</td>
<td>84.0%</td>
<td>84.0%</td>
</tr>
<tr>
<td>12</td>
<td>92.0%</td>
<td>92.0%</td>
</tr>
<tr>
<td>7</td>
<td>92.0%</td>
<td>92.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>24-35 months of Age</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>90.4%</td>
<td>90.4%</td>
</tr>
<tr>
<td>12</td>
<td>78.4%</td>
<td>78.4%</td>
</tr>
<tr>
<td>7</td>
<td>76.5%</td>
<td>76.5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>12-23 months of Age</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>90.7%</td>
<td>92.6%</td>
</tr>
<tr>
<td>7</td>
<td>89.3%</td>
<td>92.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>&lt;12 months of Age</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>69.1%</td>
<td>89.1%</td>
</tr>
</tbody>
</table>

1) UTD by 6 months equals 3 DtaP, 2 HepB, 2 Hib, 2 Polio.
2) UTD by 12 months equals 3 DtaP, 2 HepB, 2 Hib, 2 Polio.
3) UTD by 24 months equals 4 DtaP, 2 HepB, 2 Hib, 2 Polio, 1 MMR.
4) UTD by 72 months equals 5 DtaP, 4 HepB, 4 Hib, 2 MMR, 4 Polio, 1 Varicella.

Late UTD equals the same benchmarks for the age group, but it is assessed on the date the report was run.

Age (Months): This column displays the age of the patient on the assessment date.
Up-to-Date: This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the assessment date. The criteria are given at the bottom of the report page. For example, a seven-month-old UPTO-DATE patient who has met the criteria will have had three DTaP, two HepB, two HIB, and two Polio vaccinations.

Late UP-TO-DATE @ Assessment: This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the date the report was run, rather than on the assessment date.

Table 3

<table>
<thead>
<tr>
<th>Age Specific Immunization Benchmarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age Group</td>
</tr>
<tr>
<td>-----------------------------</td>
</tr>
<tr>
<td>0-2 months</td>
</tr>
<tr>
<td>2-5 months</td>
</tr>
<tr>
<td>6-10 months</td>
</tr>
<tr>
<td>11-14 months</td>
</tr>
<tr>
<td>15-17 months</td>
</tr>
<tr>
<td>18-21 months</td>
</tr>
<tr>
<td>22-24 months</td>
</tr>
<tr>
<td>25-29 months</td>
</tr>
<tr>
<td>30-39 months</td>
</tr>
</tbody>
</table>

The Age-Specific Immunization Benchmarks chart shows how many doses of each vaccine a patient should have by the age listed at the left to be determined UP-TO-DATE. This chart is used to create the Assessment of Patients Meeting Age-Specific Benchmarks table.

Table 4
### Assessment of Patients Meeting Age Specific Benchmarks

<table>
<thead>
<tr>
<th>UTD Age</th>
<th>DTp</th>
<th>Hep B</th>
<th>Hib</th>
<th>MMR</th>
<th>Polio</th>
<th>Pertussis</th>
<th>Varicella</th>
<th>Total Meeting Age Criteria</th>
<th>% Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Months</td>
<td>163</td>
<td>154</td>
<td>187</td>
<td>170</td>
<td>46</td>
<td></td>
<td></td>
<td>201</td>
<td>17.4%</td>
</tr>
<tr>
<td>6 Months</td>
<td>160</td>
<td>152</td>
<td>186</td>
<td>175</td>
<td>46</td>
<td></td>
<td></td>
<td>201</td>
<td>17.5%</td>
</tr>
<tr>
<td>9 Months</td>
<td>170</td>
<td>154</td>
<td>186</td>
<td>181</td>
<td>42</td>
<td></td>
<td></td>
<td>201</td>
<td>19.4%</td>
</tr>
<tr>
<td>12 Months</td>
<td>156</td>
<td>143</td>
<td>148</td>
<td>141</td>
<td>42</td>
<td></td>
<td></td>
<td>155</td>
<td>25.2%</td>
</tr>
<tr>
<td>18 Months</td>
<td>163</td>
<td>153</td>
<td>157</td>
<td>118</td>
<td>57</td>
<td>15</td>
<td>110</td>
<td>145</td>
<td>.7%</td>
</tr>
<tr>
<td>19 Months</td>
<td>103</td>
<td>95</td>
<td>137</td>
<td>121</td>
<td>101</td>
<td>26</td>
<td>119</td>
<td>145</td>
<td>.7%</td>
</tr>
<tr>
<td>21 Months</td>
<td>167</td>
<td>123</td>
<td>157</td>
<td>131</td>
<td>105</td>
<td>39</td>
<td>138</td>
<td>147</td>
<td>4.1%</td>
</tr>
<tr>
<td>24 Months</td>
<td>89</td>
<td>92</td>
<td>92</td>
<td>95</td>
<td>95</td>
<td>42</td>
<td>54</td>
<td>101</td>
<td>40.6%</td>
</tr>
<tr>
<td>72 Months</td>
<td>45</td>
<td>45</td>
<td>47</td>
<td>44</td>
<td>45</td>
<td>0</td>
<td>40</td>
<td>50</td>
<td>.0%</td>
</tr>
</tbody>
</table>

**UP-TO-DATE Age:** This column shows the maximum age the patient has attained by the assessment date.

**Vaccine Columns:** These seven columns display the count of the patients who have met the vaccination criteria by the UP-TO-DATE age.

**Total Meeting Age Criteria:** This column gives a count of all the patients who are at least the age listed under UP-TO-DATE Age. However, the 72 Months UP-TO-DATE Age category includes patients from 48 to 72 months of age.

**% Coverage:** This column displays the percentage of patients meeting all UP-TO-DATE criteria, out of a total of all patients at least the age listed under UP-TO-DATE Age.

### Table 5

<table>
<thead>
<tr>
<th>Children Who Could Have Been Brought Up-To-Date With Additional Immunizations</th>
<th>&lt;= 12 Months of Age</th>
<th>6</th>
<th>10.9%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Vaccine Needed</td>
<td>2</td>
<td>40.6%</td>
<td></td>
</tr>
<tr>
<td>2 Vaccines Needed</td>
<td>3</td>
<td>60.0%</td>
<td></td>
</tr>
<tr>
<td>3 Vaccines Needed</td>
<td>0</td>
<td>.0%</td>
<td></td>
</tr>
<tr>
<td>4 Vaccines Needed</td>
<td>0</td>
<td>.0%</td>
<td></td>
</tr>
</tbody>
</table>

The report breaks down the children who could have been brought up to date into three tables, ≤ 12 months, 24-36 months, and 60-72 months. This is an example of ≤ 12 months.
Column 1: In the first row of column one, the age range of patients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by this group of patients is displayed.

Column 2: In the first row of column two, a count is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of patients for this age group who need additional vaccinations to be up-to-date.

Column 3: In the first row of column three, a percent is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of patients for this age group). Subsequent rows within this column display a percentage of patients for this age group who need additional vaccinations to be up-to-date.

Table 6

<table>
<thead>
<tr>
<th>Late Start Rates</th>
<th>1</th>
<th>26-72 mo. age group</th>
<th>24-35 mo. age group</th>
<th>12-23 mo. age group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning &gt; 3 mo. age</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60-72</td>
<td>.0%</td>
<td>24 month status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>48-59</td>
<td>.0%</td>
<td>24 month status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36-47</td>
<td></td>
<td>24 month status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24-35 mo. age</td>
<td>.0%</td>
<td>24 month status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12-23 mo. age</td>
<td>5.6%</td>
<td>12 month status</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Late Start Rates: A patient who did not receive one full dose of DTaP by 90 days of age is considered to have gotten a late start. The values in column three of the late start row are the percentages of patients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of patients (column three) in various age groups (column two) who have not gone beyond 12 or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of the chart.

Table 7

<table>
<thead>
<tr>
<th>Patients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patients: Missing Birth Dose Of Hep</td>
<td>14</td>
<td>7.0%</td>
</tr>
</tbody>
</table>
The Hep B chart gives the number and percentage of patients who did not receive a birth dose of the Hep B vaccination and who did not complete the three-dose series. Patients evaluated are between six and 72 months old and have at least one immunization in CAIR.

Table 8

<table>
<thead>
<tr>
<th>Age Group on Evaluation Date</th>
<th>Total Patients In Age Group</th>
<th>Patients Not up to Date</th>
<th>Missed Opportunity on Last Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Count</td>
<td>Percent</td>
</tr>
<tr>
<td>&lt;12 months</td>
<td>6</td>
<td>5</td>
<td>83.3%</td>
</tr>
<tr>
<td>7 months benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12-23 months</td>
<td>20</td>
<td>16</td>
<td>80.0%</td>
</tr>
<tr>
<td>12 month benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24-35 months</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 month benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>36-72 months</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 month benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Age Group on Evaluation Date: This column lists the age group of the selected patients and the immunization benchmark used for evaluation.

Total Patients in Age Group: This column gives the total number of patients within the age group listed in the first column.

Patients Not up to Date: This column gives the count and percentage of patients who are not up to date for the benchmark listed in column one.

Missed Op on Last Visit: This column gives the count and percentage of patients who are not up to date and who had a missed opportunity for vaccination on the last visit on or before the evaluation date.

The missed opportunities report lists all your organization’s patients who have missed opportunities to be vaccinated. This report lists the patient’s first and last names, birth date, and date of each missed opportunity by vaccine group.
Note: Missed Opportunities Assessment
Keep in mind, since CAIR is used for reporting immunization records, it only identifies patients that had at least one immunization at their last visit, but missed an opportunity to receive additional immunizations. The Missed Opportunities Assessment in CAIR will not include any patients that were treated at your organization for any other reason except vaccination purposes.

Benchmark Reports
Benchmark reports allow CAIR users to retrieve a list and count of patients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in CAIR, exported as a text file, exported as a spreadsheet, or exported as a PDF file.

To generate a Benchmark report:
1. Click Benchmark Report under the Reports section of the menu panel.
2. Select the patient population to be assessed by clicking on one of the following:
   a. Patients Associated with Selected Site: immunization data on all patients associated with the site selected from the drop down list at the right. Patients Associated with <Organization Name> OR Patients Residing in < County Name>: immunization data on patients associated with your organization and those residing within a given county. This option is only available for county organizations. (City organization functionality has been disabled in CAIR.)
   b. All Patients Associated with <Organization Name>: immunization data on all patients associated with your organization.

3. Click one of the following to specify the patients to return on the report:
   a. Patients who did NOT meet the benchmark: a list of patients who did not meet the benchmark(s) defined in the table.
   b. Patients who DID meet the benchmark: a list of patients who met the benchmark(s) defined in the table.
   c. All patients, regardless of whether they met the benchmark or not: a list of all patients meeting the criteria defined in the table.

4. Select the age, birth date range, or age range of the patients by choosing one of the following. You may only enter up to age six years.
   a. Less than or equal to 72 months old: all patients who are 72 months old or younger.
   b. Birth date range: a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report or use the calendar icons beside each field to enter the dates.
   c. Age range: an age range. In the Youngest Age field, use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years.

5. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return a benchmark report that counts patients with sufficient refusal comments as being up-to-date.

**Note: Refusals of Vaccine**

In order for patient refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Start Date must be entered for refusal comments on the Patient Comments tab. Refer to the Managing Patients Chapter 10 of this manual for more information.

6. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.

7. Select the benchmark(s) to be used on the report:

8. To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, clicking on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.
9. To select all benchmarks in a row, you may click on the first box in the row that indicates @ X months.

10. To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.

11. Click the Generate button.

12. The Benchmark Report Status screen will display. Click on Refresh occasionally to check on the progress of the report. When the report is ready, click on the blue Benchmark hyperlink. Once this link is clicked, CAIR will display the Benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:

13. Click the Export as Text link to display the report in text file format.

14. Click the Export as a Spreadsheet link to display the report in a spreadsheet format.

15. Click the Display as a PDF link to display the report in Adobe Reader.

### Table: Age Specific Immunization Benchmarks

<table>
<thead>
<tr>
<th>Age</th>
<th>DTaP</th>
<th>Hep B</th>
<th>Hib</th>
<th>MMR</th>
<th>Polio</th>
<th>Pneumo</th>
<th>Varicella</th>
</tr>
</thead>
<tbody>
<tr>
<td>@ 3 months</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>@ 5 months</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>@ 7 months</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>@ 9 months</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>@ 12 months</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>@ 16 months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>@ 19 months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>@ 21 months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>@ 24 months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>@ 36 months</td>
<td>5</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>4</td>
<td>4</td>
<td>1</td>
</tr>
</tbody>
</table>

Or select one of these aggregate outcomes:

<table>
<thead>
<tr>
<th>@ 19 months</th>
<th>431</th>
<th>43133</th>
<th>431331</th>
</tr>
</thead>
<tbody>
<tr>
<td>@ 36 months</td>
<td>431</td>
<td>43133</td>
<td>431331</td>
</tr>
</tbody>
</table>
**Note:** The size of your file is not limited when you choose to export the Benchmark report as text. However, to export as a spreadsheet, there is a limit of 65,535 lines. The information message “file not loaded completely” will display to indicate that part of the report was truncated. When the report is displayed as a PDF, the report will be limited to about 5,000 lines (119 pages); if the report is more than 5,000 lines, a red error report banner will display.

The Benchmark Report shows a list of all patients who met the filter criteria specified when you set up the report. The report gives you a count and percent of how many patients met the specified criteria. It lists patients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each patient’s demographic information indicates whether the patient met the criteria for that vaccine and benchmark age.

<table>
<thead>
<tr>
<th>No.</th>
<th>First Name</th>
<th>Last Name</th>
<th>Birth Date</th>
<th>Primary Phone Number</th>
<th>Cell Phone Number</th>
<th>Street</th>
<th>City</th>
<th>State</th>
<th>Zipcode</th>
<th>DTaP (%)</th>
<th>HepB (2)</th>
<th>Hib (2)</th>
<th>Polio (2)</th>
<th>Pneumo (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LINDY</td>
<td>DAVIS</td>
<td>11/03/1995</td>
<td>555-555-5555</td>
<td>555-555-5555</td>
<td>SOMERSET AVENUE</td>
<td>OAKLAND</td>
<td>CA</td>
<td>94021</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>2</td>
<td>JENNY</td>
<td>SMITH</td>
<td>11/02/1995</td>
<td>555-555-5555</td>
<td>555-555-5555</td>
<td>HICKORY STREET</td>
<td>OAKLAND</td>
<td>CA</td>
<td>94021</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

...
Group Patients Report
The purpose of Group patients is to run either the Immunization History Report for a group of selected patients. To run one of these reports, complete the following steps: 1. Click **Group Patients** under the Reports section of the menu panel.

<table>
<thead>
<tr>
<th>Immunization History Report</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Checkboxes and inputs" /></td>
</tr>
<tr>
<td><strong>Specify how to sort data</strong></td>
</tr>
<tr>
<td>Sort By: Last Name, then by Age</td>
</tr>
<tr>
<td><strong>Generate</strong></td>
</tr>
</tbody>
</table>

2. To run a report for patients in a specific birth date range, click on the check box on the first line. Enter a from birth date and to birth date in MM/DD/YYYY format.
3. To run a report for patients who have immunizations administered by one of your sites, click on the check box on the second line. Choose a site from the drop down list. By selecting this option, you will limit this report to immunizations administered at your site.
4. To run a report for patients who have an immunization in a specific date range, click on the check box on the third line. Enter a from and to date in MM/DD/YYYY format.

**Note:** You may combine any of the criteria in the above steps. The system only selects patients who fulfill all the criteria you specify.

5. You may choose a sort order. Your two options are either by Last Name then Age or by Age, then Last Name.
6. If you wish to start over, click the **Reset** button. The system erases all the criteria you entered and starts with a fresh page. You may proceed to enter your criteria again.
7. When criteria are completed, click the **Generate** button. Click the **Refresh** button periodically (use same language used in assessment reports section) the system starts to generate the report and takes you to the Group Patient Reports Request Status screen.
8. After the report finishes generating, the top line on the Group Patient Reports Request Status screen becomes a hyperlink. Click the hyperlink.
9. The system displays the report output in PDF.

**Reminder/Recall**
From the Reports menu option, you may generate reminder and recall notices, which include letters, mailing labels, and patient listings.

---

**Note:** Generation of reminder and recall notices
Reminder and recall notices can be generated for each patient, if the following conditions are met:
- The status is Active in the Patient Information Section for your organization.
- The Allow Reminder and Recall Contact? indicator in the Patient Information Section is Yes.
- The patient has complete address information listed in the Address Information Section.

---

**Reminder Request Status screen**
Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Reminder Request Status screen indicates the percentage of completion. Periodically click on Refresh to update the status.

---

**Note:** Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in CAIR while the report is generating and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of CAIR and return to the status screen by clicking on the Check Reminder Status link after logging in again.

---

**Summary Screen**
When the report is complete, you may click on the blue date hyperlink to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.
On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

1. Clicking **Preview Patients** will provide a list of patients included in the Reminder Recall Report. This information is presented on the screen and includes a hyperlink to each patient’s demographic record.

2. Clicking **Increment Eligible** will reset the last notice date for all patients eligible for this reminder. The last notice date is viewable on the patient’s demographic record under the organization information section.

3. Increment last notice date for all patients immunized by your organization.

4. Click **Cancel** to return to the Reminder Request Status screen.

**Reminder/Recall Output Options**

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.
Reminder Letters

The letter output option allows you to generate a standard form letter for the parent/guardian for each patient returned on your query. The letter allows room at the top for your organization’s letterhead. The body of the letter includes the patient’s immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number.

To generate Reminder Letters:
1. Under the Additional Input column or the Letter section of the table, you have the option of entering:

<table>
<thead>
<tr>
<th>Output</th>
<th>Description</th>
<th>Additional Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reminder Letter</td>
<td>Standard Reminder Letter.</td>
<td>Report Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Free Text</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Phone #</td>
</tr>
</tbody>
</table>

   a. If a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen.
   b. You may include a maximum of 400 characters in additional information in the Free Text field. Any information entered in this text box will be presented as the closing for each of the letters generated in your report.
   c. The telephone number is presented in the closing for each of the letters generated in your report.

2. Click Reminder Letter, which is a hyperlink.
3. Your report will be listed on the Reminder Request Status screen. The bottom table shows the name of the request, the date and time it was started and the status of the request.
   a. You have the option of moving to other portions of CAIR or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
   b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.

4. Once the status displays as Ready and the report name becomes a hyperlink, your letters are ready to be viewed. Click the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click the printer icon on the Adobe® toolbar. Click the OK button in the Print dialog box.
6. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Reminder Card

The Reminder Card output option allows you to generate a standard reminder card for the parent/guardian for each patient returned on your query. The card allows room at the top for a
greeting. The body of the card includes the patient’s recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Cards, follow these steps:

1. Under the Additional Input column or the Letter section of the table, you have the option of entering the following information: o If a Report Name is not indicated, the report will simply be named Reminder Card on the Reminder Report Status screen
2. You may include a maximum of 400 characters in the Free Text field. Any information entered in this text box will be presented as the closing for each of the cards generated in your report.
3. The telephone number is presented in the closing for each of the cards generated in your report.

Dear Parent of Violet Georgia Dallman,

Our records show that Violet Georgia Dallman may be due for the following immunizations. If Violet received these or other immunizations from another health care provider, please call our office so that we can update Violet's record. Otherwise please schedule an appointment for Violet to receive them.

<table>
<thead>
<tr>
<th>Immunizations Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP, NOS</td>
</tr>
<tr>
<td>HepA, NOS</td>
</tr>
<tr>
<td>HepB, NOS</td>
</tr>
<tr>
<td>Hib, NOS</td>
</tr>
<tr>
<td>MMR</td>
</tr>
<tr>
<td>PCV13</td>
</tr>
<tr>
<td>Polio, NOS</td>
</tr>
<tr>
<td>Varicella</td>
</tr>
</tbody>
</table>

Mailing Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160 or 3256. To generate mailing labels, follow these steps:

1. Click Mailing Labels, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
2. You have the option of moving to other portions of CAIR or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.

3. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
   a. Once the report name becomes a hyperlink, your labels are ready. Click the report name to view or print the labels in Adobe Reader®.
   b. To print the labels, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.

4. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

**4 Up Card**

The 4 Up Card is a message from the provider organization to the patient indicating they are due for immunizations.

<table>
<thead>
<tr>
<th>4 Up Card</th>
<th>CAIR 4 Up Cards</th>
<th>Report Name</th>
</tr>
</thead>
</table>

1. Click **the 4 Up Card**, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   a. You have the option of moving to other portions of CAIR or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.
   b. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
   c. Once the report name becomes a hyperlink, your labels are ready. Click the report name to view or print the labels in Adobe Reader®.
   d. To print the labels, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
   c. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.
Patient Query Listing

The Patient Query Listing displays contact information for those patients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every patient that was returned in the report query process. To generate a Patient Query Listing:

1. Click the Patient Query Listing hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
   a. You have the option of moving to other portions of CAIR or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
   b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
3. Once the report name becomes a hyperlink, your report is ready. Click the report name to view or print the report in Adobe Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click OK in the Print dialog box.
5. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Extract Client Data
The Extract Client Data displays patient demographic information, immunization history, and recommendations for those patients identified as being due/overdue in the Reminder/Recall output in XML format. This report lists every patient that was returned in the report query process. To extract client data in XML format:

1. Click the **Extract Client Data** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

### Reminder Request Status

<table>
<thead>
<tr>
<th>Started</th>
<th>Completed</th>
<th>Status</th>
<th>Patients</th>
<th>Target From</th>
<th>Target To</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/01/2011 05:58 AM</td>
<td>08/01/2011 06:01 AM</td>
<td>100 %</td>
<td>10</td>
<td>08/01/2011</td>
<td>08/01/2011</td>
</tr>
<tr>
<td>07/29/2011 07:06 AM</td>
<td>07/29/2011 07:07 AM</td>
<td>100 %</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Reminder Output Status

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Requested</th>
<th>Started</th>
<th>Completed</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client XML</td>
<td>Client XML</td>
<td>08/01/2011 06:24 AM</td>
<td>08/01/2011 06:24 AM</td>
<td>08/01/2011 06:24 AM</td>
<td>Ready</td>
</tr>
<tr>
<td>Reminder Letter</td>
<td>Reminder Letter</td>
<td>08/01/2011 06:01 AM</td>
<td>08/01/2011 06:01 AM</td>
<td>08/01/2011 06:01 AM</td>
<td>Ready</td>
</tr>
</tbody>
</table>

**Creating Custom Letters**

In addition to the standard letter, CAIR allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps:

1. Click **Manage Custom Letter** under Reports on the menu panel.
   - Manage custom letters
     - **Long Test Nov 18 2010**
     - **Long Test Oct 29 2010**
     - **New Custom Letter**

2. Click the **New Custom Letter** hyperlink.
3. At the Create New Custom Letter screen, enter the following:
   a. Top Margin: Choose the number of blank lines you would like at the top of the letter from the drop down list provided. These blank spaces will leave room to print the letters on your office letterhead.
b. Include Patient Address:
   i. Check the box to include the patient’s address at the top of the letter.

c. To include a name with the patient address, choose from the drop down list one of the following:
   i. (no name) - default
   ii. Patient name
   iii. To the parent/guardian of patient name

b. Salutation: Enter a greeting, and then choose a name option from the drop down list provided.
   i. If name is chosen, the name of the patient will show up after the salutation.
   ii. If responsible person is chosen, the letter will read
      <salutation> Parent/Guardian of <patient name>

4. Paragraph 1:
   a. In the field marked First Part, enter desired text.
   b. If you do not wish to include a name, you may enter all of the first paragraph text in the field marked First Part and select no name from the name drop down list.
   c. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a single space. Next, choose the name you would like to appear within the paragraph from the drop down list (either parent/guardian, patient name or no name).
   d. In the field marked Second Part, continue to enter the rest of the text.
   e. Immunization History: Check the box to include the patient’s immunization history in the letter.

   f. The maximum amount of allowed characters in this field is 4,000.

5. Paragraph 2: You may enter more text in this field.
   a. Immunization recommendations: Check this box to include the immunization forecast for the patient in the letter.
   b. The maximum amount of allowed characters in this field is 4,000.

6. Paragraph 3: You may enter text in this field.
   a. Closing: Enter a closing word or statement in this field. If you wish to include your provider, organization’s name and/or telephone number after the closing, check the appropriate boxes.
   b. Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, click on Save.
   c. The maximum amount of allowed characters in this field is 4,000.
Once you have saved the custom letter, click on check reminder status in the left hand menu bar. Then select the reminder report you want to use to generate your custom letter.

Generating Custom Letters
The custom letter output option allows you to generate a customized letter for each patient returned on your query. To create a new custom letter, refer to the Creating Custom Letters section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen:

1. Every time you generate a custom letter, you will want to give the report a unique name. This name is different from the custom letter name. You will want to name the report prior to clicking on the custom letter hyperlink.
2. Click the link with the name of the custom letter. The letter will begin generating immediately.
3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
   - You have the option of moving to other portions of CAIR or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the report name becomes a hyperlink, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click on the printer icon on the Adobe® toolbar. Click on OK in the Print dialog box.
6. To print additional output, click on the back button on your browser. At the Reminder Request Status screen, click on the reminder request hyperlink (top table) to return to the Reminder Request Process Summary screen.
Vaccine Eligibility
The Vaccines for Children (VFC) Report details the number of patients that were vaccinated by your organization for each Vaccine Eligibility type for a specified date range. To generate a VFC Report:

1. Click **Vaccine Eligibility** under the Reports section of the menu panel.

2. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
3. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
4. Choose a type of VFC Report to run. You have three choices:
   a. The Vaccine Group report displays a summary of doses by vaccine eligibility and vaccine groups
   b. The Dosed Based Eligibility Report displays the number of doses given by your site.
   c. The Patient Population Estimates Report displays the total number of unique patients immunized by your site.
5. Click the **Generate Report** button. The reports drop into a processing queue:

<table>
<thead>
<tr>
<th>VFC Report Status</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report Name</strong></td>
<td><strong>Started</strong></td>
<td><strong>Completed</strong></td>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>VFC Dose Based Eligibility</td>
<td>08/04/2016 07:52:10 AM</td>
<td>08/04/2016 07:52:11 AM</td>
<td>100%</td>
</tr>
<tr>
<td>VFC by Vaccine Group</td>
<td>08/04/2016 07:49:44 AM</td>
<td>08/04/2016 07:49:44 AM</td>
<td>100%</td>
</tr>
</tbody>
</table>
7. Click Refresh until the statuses are 100%; then click on the underlined hyperlink, and you will be presented with an adobe file which contains your report. From here you can print the document; then close the document window to return to the results screen.

**VFC by Vaccine Group**

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>V01</th>
<th>V02</th>
<th>V03</th>
<th>V04</th>
<th>V05</th>
<th>V07</th>
<th>CAA0</th>
<th>UNK</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adeno</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Diphtheria</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>DTPaP</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>DTPiAP-Polio</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Encephalitis</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>HepA</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>HepB</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>HepB-Hib</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Hib</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Influenza-seasonal</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Lyme</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Measles</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>MMR</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Plague</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
### Dose Based Eligibility Report

**CAIR**

Dose Based Eligibility Report  
Printed on: 08/04/2016 7:52 AM  
Vaccination Date Range: 08/04/2015 to 08/04/2016  
Provider ID: IRPH

This report displays the total number of vaccine doses give by your site *(Doses Administered)* during the date range, sorted by patient age and vaccine. It also extrapolates the date range doses totals to a full year *(Annualized)*.

<table>
<thead>
<tr>
<th>Vaccine Eligibility</th>
<th>-1 yr</th>
<th>1-5 yrs</th>
<th>7-18 yrs</th>
<th>19+ yrs</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Date Range</td>
<td>Annualized</td>
<td>Date Range</td>
<td>Annualized</td>
<td>Date Range</td>
</tr>
<tr>
<td>A. VFC Eligible Medi-Cal/CHDP</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>B. VFC Eligible Uninsured</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>C. VFC Eligible Native American/AK Native</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>D. VFC Eligible Underinsured (FQHC/RHC)</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>SUBTOTAL (A+B+C+D)</strong></td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>E. 317 Eligible LHD or HDAS Only</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>F. State General Funding</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>SUBTOTAL (A+B+C+D+E+F)</strong></td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>G. Privately-purchased vaccine</td>
<td>4</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>H. Eligibility Unknown</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>SUBTOTAL (A+B+C+D+E+F+G+H)</strong></td>
<td>7</td>
<td>7</td>
<td>3</td>
<td>3</td>
<td>7</td>
</tr>
</tbody>
</table>

### Patient Population Estimates Report

**CAIR**

Patient Population Estimates Report  
Printed on: 08/04/2016 7:55 AM  
Vaccination Date Range: 08/04/2015 to 08/04/2016  
Provider ID: IRPH

This report displays the total number of unique patients immunized by your site *(Patients)* during the date range, sorted by patient age and vaccine at the time of vaccination. It also extrapolates the date range doses totals to a full year *(Annualized)*.

<table>
<thead>
<tr>
<th>Vaccine Eligibility</th>
<th>-1 yr</th>
<th>1-5 yrs</th>
<th>7-18 yrs</th>
<th>19+ yrs</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Date Range</td>
<td>Annualized</td>
<td>Date Range</td>
<td>Annualized</td>
<td>Date Range</td>
</tr>
<tr>
<td>A. VFC Eligible Medi-Cal/CHDP</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>B. VFC Eligible Uninsured</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>C. VFC Eligible Native American/AK Native</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>D. VFC Eligible Underinsured (FQHC/RHC)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>SUBTOTAL (A+B+C+D)</strong></td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>E. 317 Eligible LHD or HDAS Only</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>F. State General Funding</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>SUBTOTAL (A+B+C+D+E+F)</strong></td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>G. Privately-purchased vaccine</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>H. Eligibility Unknown</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>SUBTOTAL (A+B+C+D+E+F+G+H)</strong></td>
<td>5</td>
<td>5</td>
<td>2</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>
Vaccine Accountability Report

The Vaccine Accountability Report provides information about inventory transactions entered into CAIR for selected quarterly time periods. The report is available to designated user roles only. If you feel as though you need access to the Accountability Report please contact the CAIR Help Desk. The Vaccine Accountability Report can be generated for a single organization, multiple organizations, or All VFC organizations (available to state-level user roles only). When the Vaccine Accountability Report is generated for a single organization, both a Summary report and a Detail report will be created. When the Vaccine Accountability Report is generated for multiple organizations or All VFC organizations, only a Summary report will be created. To generate a Vaccine Accountability Report:

1. Click **Accountability Report Request** under the Reports section of the menu panel.

Vaccine Accountability Report Request

| Begin Date: | End Date: |

Select Accountability for Organization

- VFC Clinics Statewide
- Select Individual Organization

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Selected Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002BPHCRIZR-Placeholder</td>
<td></td>
</tr>
<tr>
<td>Acme Immunization Clinic</td>
<td></td>
</tr>
<tr>
<td>Acme Immunization Corporate</td>
<td></td>
</tr>
<tr>
<td>California Immunization Program</td>
<td></td>
</tr>
<tr>
<td>Dave S Provider</td>
<td></td>
</tr>
</tbody>
</table>

Select Type of Vaccine:

- VFC
- 317
- State General Funding
- Private
- All

If Individual Organization option is chosen and only one Org is selected, in addition to the Summary Report that shows Accountability by Vaccine Group, a Detail Report will be available that shows accountability by individual lot numbers, sorted by Vaccine Group.

Report Name:  

[Generate] [Cancel]
1. Select the beginning quarter/year from the Begin Date drop down list. (The options provided appear as “Quarter [#], [YYYY]”, for instance “Quarter 4, 2013”. The IIS translates the selected quarter to the **FIRST** date of that quarter, which is October 1, 2013.)

2. Select the ending quarter/year from the End Date drop down list. (The options provided appear as “Quarter [#], [YYYY]”, for instance “Quarter 4, 2013”. The IIS translates the selected quarter to the **LAST** date of that quarter, which is December 31, 2013.)

---

**Note:** It is acceptable to select the same quarter option in the Begin Date and End Date drop down lists. For instance, if Quarter 4, 2013 is selected for both the Begin Date and End Date, the report period will be October 1 - December 31, 2013.

**Quarter breakdown:**
- Quarter 1: January 1 – March 31
- Quarter 2: April 1 – June 30
- Quarter 3: July 1 – September 30
- Quarter 4: October 1 – December 31

---

4. Select the organization options available to you (not all options are available to all user roles).
   a. The “Select Individual Organization” option may be selected in order to run a Vaccine Accountability Report for one or more selected organizations.
      i. Most user roles will see their assigned IIS organization(s) displayed in the Organization Name list box and may select one or more organizations for the report.
      ii. If you are assigned to one organization and are not a state-level user, your organization will automatically be selected for you.
      iii. State-level users have all IIS organizations with a VFC status of Active or Suspended displayed in the Organization Name list box and may select one or more organizations for the report.
   b. For state-level user roles only, the “VFC Clinics Statewide” option may be selected in order to run a Vaccine Accountability Report for all clinics that have a VFC Status of Active or Suspended.

5. Choose the type of vaccine you would like to include in your Vaccine Accountability Report. Options include Enter the report name in the Report Name text box. Entering a report name is optional. If no report name is entered, CAIR will automatically assign a report name as shown below:
   a. One organization Detail report: “[Organization Name]_Detail.xls”
   b. One organization Summary report: “[Organization Name].xls”
   c. Multiple Organization Summary report: “Multiple_Orgs.xls”
   d. VFC Clinics Statewide Summary report: “Statewide.xls”

6. Click the **Generate** button.
7. The report request drops into a processing queue. In order to update the Status, click on the refresh button. When status indicates “100%” you can click on the underlined hyperlink(s) to view the report.

8. The reports are in the ‘.xls’ spreadsheet format, so you may be prompted to open or save the file. Choose from the options presented: Open, Save, or Cancel. The file will open in the program on your computer that is set to open ‘.xls’ files, such as Microsoft Excel.

9. To print the report, click on the printer icon on the Microsoft Excel toolbar or other program that has opened the file.

10. Click the Print button in the Print dialog box.
### Vaccine Accountability – Detail Report

1. The Detail Report contains accountability data grouped by Vaccine Group and Lot Number.

<table>
<thead>
<tr>
<th>Vaccine Group</th>
<th>Lot Number</th>
<th>- Starting Inventory</th>
<th>- Doses Received</th>
<th>- Doses Reported</th>
<th>- Doses Expired</th>
<th>- Doses Spoiled</th>
<th>- Doses Wasted</th>
<th>- Doses Transferred Out</th>
<th>- Ending Inventory</th>
<th>Accounted for Doses</th>
<th>Accounted for %</th>
</tr>
</thead>
<tbody>
<tr>
<td>HepA</td>
<td>adult 1</td>
<td>55</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>30</td>
<td>30</td>
<td>60.00%</td>
</tr>
<tr>
<td>HepA</td>
<td>ALL</td>
<td>50</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>30</td>
<td>30</td>
<td>60.00%</td>
</tr>
<tr>
<td>HepA-HepB</td>
<td>dupe-test</td>
<td>0</td>
<td>13</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>13</td>
<td>13</td>
<td>100.00%</td>
</tr>
<tr>
<td>HepA-HepB</td>
<td>ALL</td>
<td>9</td>
<td>13</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>13</td>
<td>13</td>
<td>100.00%</td>
</tr>
<tr>
<td>HepB</td>
<td>123x1</td>
<td>53</td>
<td>0</td>
<td>-1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-1</td>
<td>40</td>
<td>40</td>
<td>90.00%</td>
</tr>
<tr>
<td>HepB</td>
<td>ALL</td>
<td>59</td>
<td>9</td>
<td>-1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-1</td>
<td>49</td>
<td>49</td>
<td>98.00%</td>
</tr>
<tr>
<td>HepB-Hib</td>
<td>TestB</td>
<td>0</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>7</td>
<td>100.00%</td>
</tr>
<tr>
<td>HepB-Hib</td>
<td>ALL</td>
<td>0</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>7</td>
<td>100.00%</td>
</tr>
<tr>
<td>Hib</td>
<td>Privately</td>
<td>87</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-17</td>
<td>0</td>
<td>0</td>
<td>70</td>
<td>87</td>
<td>100.00%</td>
</tr>
<tr>
<td>Hib</td>
<td>ALL</td>
<td>87</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-17</td>
<td>0</td>
<td>0</td>
<td>70</td>
<td>87</td>
<td>100.00%</td>
</tr>
<tr>
<td>Meningo</td>
<td>LOT10087120</td>
<td>4</td>
<td>0</td>
<td>-1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-3</td>
<td>0</td>
<td>4</td>
<td>100.00%</td>
</tr>
<tr>
<td>Meningo</td>
<td>LOT10207216</td>
<td>28</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-3</td>
<td>20</td>
<td>22</td>
<td>100.00%</td>
</tr>
<tr>
<td>Meningo</td>
<td>ALL</td>
<td>29</td>
<td>0</td>
<td>-1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-3</td>
<td>20</td>
<td>22</td>
<td>100.00%</td>
</tr>
<tr>
<td>Polio</td>
<td>LOT1076110</td>
<td>28</td>
<td>0</td>
<td>-3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-20</td>
<td>2</td>
<td>22</td>
<td>68.29%</td>
</tr>
<tr>
<td>Polio</td>
<td>ALL</td>
<td>28</td>
<td>0</td>
<td>-3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-20</td>
<td>2</td>
<td>22</td>
<td>68.29%</td>
</tr>
<tr>
<td>Td/Tdap</td>
<td>123521</td>
<td>69</td>
<td>0</td>
<td>-1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>75</td>
<td>80</td>
<td>89.89%</td>
</tr>
</tbody>
</table>

### Vaccine Accountability – Summary Report

1. The Summary Report contains accountability data grouped by Vaccine Group, with all lot numbers combined.
Understanding Vaccine Accountability Report

Columns and Calculations:

<table>
<thead>
<tr>
<th>+ Starting Inventory</th>
<th>+ Doses Received</th>
<th>- Doses Reported</th>
<th>- Doses Expired</th>
<th>- Doses Spoiled</th>
<th>- Doses Wasted</th>
<th>- Doses Transferred Out</th>
<th>+ Ending Inventory</th>
<th>Accounted for Doses</th>
<th>Accounted for %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
</tr>
</tbody>
</table>

The following inventory transactions are “counted” in each of the above categories of the Vaccine Accountability Report. See p. 70, *Table 1: Reasons for adding or subtracting inventory* for more details on these transaction types.

1. Inventory units on-hand at begin date of report (active non-expired)
2. Doses Received, transfers in, and ‘+’ error correction
3. Immunizations Given less Immunizations Deleted (must be recorded in the IIS with a valid eligibility code)
4. Expiration reported by Provider (automatic inventory transaction)
5. Spoilage reported by Provider, Failure to store properly on receipt by Provider, Refrigeration failure report by Provider
6. Other not usable by Provider, doses recalled, and 'error correction
7. Doses Transferred Out
8. Inventory units on hand at end date of report (active, non-expired): per system
9. Accounted for Doses = |(3+4+5+6+7)|+8
10. Accounted for Doses / Total vaccine doses |(3+4+5+6+7)|+8 / 1+2
   i.e., total accounted for transactions + ending inventory / total
   theoretical doses available
11. Unaccounted for includes sum of negative values for (-) doses administered transaction (doses that
   were manually subtracted, not deducted via inventory modification), (-) Lost or unaccounted for in
   Provider Inventory, (-) doses recorded in the IIS without a valid eligibility code, and (+) doses
   deleted in the IIS without a valid
   eligibility code for the org

Detailed List of Inventory Transactions

The code is what is displayed in the Show Transactions report in CAIR.

<table>
<thead>
<tr>
<th>CODE</th>
<th>-/+</th>
<th>DESCRIPTION</th>
<th>SOURCE OF TRANSACTION</th>
<th>SOURCE TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>REC</td>
<td>Receipt of Inventory</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>B</td>
<td>REC</td>
<td>Receipt of Inventory</td>
<td>Add inventory is saved, Order/transfer Received</td>
<td>automated</td>
</tr>
<tr>
<td>C</td>
<td>RET</td>
<td>Doses Returned</td>
<td>Rejected transfer that is restocked in inventory</td>
<td>automated</td>
</tr>
<tr>
<td>D</td>
<td>RET</td>
<td>Doses Returned</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>E</td>
<td>TRA</td>
<td>transfers out of inventory</td>
<td>Orders from or transfers from inventory</td>
<td>automated</td>
</tr>
<tr>
<td>F</td>
<td>TRA</td>
<td>Doses Transferred</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>G</td>
<td>Immunize</td>
<td>Immunizations Given</td>
<td>Imm is added to patient's record</td>
<td>automated</td>
</tr>
<tr>
<td>H</td>
<td>Delete</td>
<td>Immunizations Deleted</td>
<td>Imm is deleted from patient record</td>
<td>automated</td>
</tr>
<tr>
<td>I</td>
<td>ERR</td>
<td>Error Correction</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>J</td>
<td>RECALL</td>
<td>Doses Recalled</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>K</td>
<td>ADMIN</td>
<td>Doses Administered</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>M</td>
<td>3</td>
<td>Spoilage reported by Provider</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>N</td>
<td>4</td>
<td>Expiration reported by Provider</td>
<td>Counts auto-generated when reports run</td>
<td>automated</td>
</tr>
<tr>
<td>O</td>
<td>5</td>
<td>Lost/damaged in transit to Provider</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>P</td>
<td>6</td>
<td>Failure to Store properly</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
</tbody>
</table>
Forms and Reports

### Inventory Transactions within Vaccine Accountability Report columns

<table>
<thead>
<tr>
<th>+ Starting Inventory</th>
<th>+ Doses Received</th>
<th>- Doses Reported</th>
<th>- Doses Expired</th>
<th>- Doses Spoiled</th>
<th>- Doses Wasted</th>
<th>- Doses Transferred Out</th>
<th>+ Ending Inventory</th>
<th>Accounted for Doses</th>
<th>Accounted for %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>ending inventory</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>from prior</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>report run</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A, B, C, D, T and I</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>when positive</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G*, W*, (H*)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N, V</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>M, P, Q</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>J, S, and I when</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>negative</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E, F, O, U, X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>active, non-</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>expired QOH per</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>system</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note that some transaction types are treated differently based on whether they are accompanied by a valid vaccine eligibility code:

G*, W* = count if the immunization administered contains a vaccine eligibility code

H* = Delete transaction of an immunization administered that contains a vaccine eligibility code, which lowers the count of Doses Reported


G**, W** = unaccounted for if the immunization administered does not contain a vaccine eligibility code

H** = Delete transaction of an immunization administered that does not contain a vaccine eligibility code
**State Supplied Flu Report**

1. Users with a role that has reports will be able to generate the State Supplied Flu Report
2. The user will click on the state supplied FLU report link
3. The User will select the date range.
   a. The From Date will only allow you to enter 08/01/2013 and forward. This is far back as the reporting will go.

**State Supplied Flu Report**

**Report Date Range**

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/01/2013</td>
<td></td>
</tr>
</tbody>
</table>

**State Supplied Flu Report**

**Trade Name / Presentation**

<table>
<thead>
<tr>
<th>Trade Name / Presentation</th>
<th>Lot Number</th>
<th>6 - 29 Months</th>
<th>3 - 6 Years</th>
<th>7 - 18 Years</th>
<th>19 - 49 Years</th>
<th>50 - 99 Years</th>
<th>60 - 64 Years</th>
<th>65+ Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>APLURIA</td>
<td></td>
<td>VFC 317 State GF</td>
<td>VFC 317 State GF</td>
<td>VFC 317 State GF</td>
<td>VFC 317 State GF</td>
<td>VFC 317 State GF</td>
<td>VFC 317 State GF</td>
<td>VFC 317 State GF</td>
</tr>
<tr>
<td>VS0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>VS9</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>INF9899</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Note:**
- This report displays all lots of Flu vaccine in inventory that were active during the date range entered.
- **State GF** - State General Fund
- **Expired lots**

**State-Supplied Vaccine Report**

4. Users with a role that has reports will be able to generate the State Supplied Vaccine Report
5. The user will click on the state supplied Vaccine report link
6. The User will select the date range.
   a. The From Date will only allow you to enter 07/01/2012 and forward. This is far back as the reporting will go.
### State-Supplied Vaccine Report

#### Provider ID: IR Physicians

| Vaccine Code | Lot Number | Expiration Date | From: 07/01/2012 | To: 08/04/2016 | Total | # Doses Available as of today 
8/4/16 8:19 AM |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP</td>
<td></td>
<td></td>
<td>VFC</td>
<td>317</td>
<td>State GF</td>
<td></td>
</tr>
<tr>
<td>DTaP-HepB-IPV</td>
<td></td>
<td></td>
<td>&lt;=18</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DTaP-IPV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DTaP-IPV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DTaP-IPV/Hib</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HPV, NOS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HPV, Quadrivalent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HepB-Hib</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HepB-Peds</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Expired** = Expired lots during date range.

**State GF** = State General Fund.

#### Refrigerated Vaccines

<table>
<thead>
<tr>
<th>Vaccine Code</th>
<th>From: 07/01/2012</th>
<th>To: 08/04/2016</th>
<th>Total</th>
<th># Doses Available as of today 8/4/16 8:19 AM</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DTaP-HepB-IPV</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DTaP-IPV</td>
<td></td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DTaP-IPV/Hib</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>HPV, NOS</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>HPV, Quadrivalent</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>HepB-Hib</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>HepB-Peds</td>
<td>19</td>
<td>0</td>
<td>0</td>
<td>19</td>
</tr>
<tr>
<td>Meningococcal, NOS</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Pneumococcal, NOS</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Chapter 11 Data Exchange

In this chapter:
- Introduction
- Data Exchange via CAIR Web service
- Data Exchange via CAIR Interface
- Health Plan Data Exchange
- Check Status
Introduction
Thank you for your interest in electronic data exchange with CAIR. Getting immunization data into CAIR is important for your clinic and for the individuals you serve. CAIR is interested in finding the least burdensome method for your clinic to submit data to CAIR.

Data Frequency
Timely data submission to CAIR benefits providers and the patients they serve by making complete immunization records accessible through the system as soon as possible. Real-time data submission is possible via Health Level Seven (HL7) real-time messaging (see Data Formats Accepted below).

Data Formats Accepted:
CAIR currently accepts the following electronic file types:
- Health Level Seven (HL7) Version 2.5.1 standard files
- Health Level Seven (HL7) Version 2.5.1 Real Time Transfer
- Fixed format flat text files (Health Plans only)

Data Exchange via the CAIR Web Service
The process for submitting EHR data to CAIR is summarized on the CDPH Gateway/CAIR IZ Portal - 5 Steps to Data Exchange page at cairweb.org. Your clinic must first register at the CAIR IZ Portal then follow instructions received in the confirmation email. EHR submissions to CAIR2 must use SOAP transport and the CAIR WSDL. Please see the CAIR HL7 v2.5.1 Data Exchange Specifications and CAIR2 Test Plan (SOAP/WSDL setup) documents for message specifications and instructions.

Data Exchange via the CAIR Interface
The data exchange feature of CAIR allows the capability to exchange patient, immunization and comment data files. Only CAIR state staff or users with Data Exchange roles will be able to perform data exchange. Use of the web interface for data exchange is reserved primarily for Health Plan users.

Health Plan Data Exchange
Prior to performing an HMO data exchange, your HMO will need to contact the CAIR Data Exchange staff (CAIRDataExchange@cdph.ca.gov) and arrange for your organization to be set up to perform data exchange.

You will need to provide the following information on your whether you prefer to submit patient data in HL7 (CAIR HL7 v2.5.1 Data Exchange Specifications) or Flat File (CAIR2 Health Plan Flat File Transfer Specifications) format.

Note: Files have a size limit of 150 MB combined of the patient, immunization, and comment files that can be uploaded via the user interface. If files are larger than 150 MB, they will need to be split into smaller files for loading.
To perform a Health Plan Data Exchange:
1. Click Submit HMO Data or Submit HMO Query under the Data Exchange menu option. Depending upon the selection made and the type of file format you are set up to use, one or more of the following fields will display:
   a. Job Name: Fill in a name for the data exchange, if desired. If left blank, CAIR will use the current date for a job name.
   b. For Flat File Submissions:
   c. Patient File Name: This field is required if your file format is Flat File. Click on Browse to select the appropriate Patient File Name.
   d. Immunization File Name: This optional field will appear if you exchange data via Flat File format. HMO/MCOs are not required to send immunization data.
   e. Comment File Name: This is an optional field that will appear if you exchange data via Flat File format.
   f. For HL7 File Submissions:
   g. File Name: This field is required for users who are exchanging data using the HL7 file format. Click on Browse to select the HL7 file you wish to upload.
   h. For HMO Query Files:
   i. This field is required for users who are running an HMO query. Click on Browse to select the appropriate query file. For the format of the HMO query, please see the HMO Query Specification.

Note: The Health Plan must first submit patient data into CAIR before a query will run successfully. Only patients that are shown to be affiliated with an Health Plan will be returned to the Health Plan via a data query.

Submit HMO Data Screen:

1. Browse to the Patient File and select. Do this with the each file type you’d like to load.
2. When finished selecting files to load, click Upload.
3. The Exchange Data Result screen will display, and list the files that were uploaded and confirm the job name you entered or provide the date as a job name.

<table>
<thead>
<tr>
<th>Exchange Data Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following HMO flat files were uploaded:</td>
</tr>
<tr>
<td>LONG_HMO_CLIENT.txt</td>
</tr>
<tr>
<td>Check Status</td>
</tr>
</tbody>
</table>

Job Name which is set as default string "Job 07/07/2011 07:13:09" has been presented for processing.

4. Click the Check Status button.
5. The Exchange Data Status screen will display, and contain the job name, user name, exchange data date, process start and end date, and status of the current job.

<table>
<thead>
<tr>
<th>Exchange Data Status</th>
<th>Past 7 Days</th>
<th>Realtime?</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Name</td>
<td>User Name</td>
<td>Exchange Date</td>
<td>Process Start Date</td>
<td>Process End Date</td>
</tr>
</tbody>
</table>

6. Click Refresh periodically to check the status of the job.
7. When a job is complete, the job name will appear as a hyperlink.
   Under the status column, one of three messages may appear:
   a. Complete: has completed processing
   b. Error: could not be processed because of formatting errors
   c. Exception: could not be processed because of an internal system error

8. Click the job name hyperlink.
9. If the job completed successfully, the Job Detail screen will display. For jobs created from the Submit HMO Data menu option, these sections will display:
   a. Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "CAIR to provider organization" download files. Click on the download name hyperlink to download the file.
   b. Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).
   c. Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.
Submit HMO Query Screen:

1. For jobs created using the Submit HMO Query menu option, the following sections will display:
   a. Download Files for: <Job Name>: Contains the Inbound Query File, Outbound Demographic File, Outbound Immunization File, and Exception File, if there was an error processing the Inbound Query File, all available for download by clicking on the file name hyperlink.
   b. Download Log for: <Job Name>: Contains information regarding activity of the download files.

2. If the job did not complete successfully, the Job Error screen will display. This screen contains an explanation of why the exchange data could not be processed, the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

HMO Query Result File Formats

<table>
<thead>
<tr>
<th>organization</th>
<th>IR Physicians • user Chris Mattson • role CAIR Developer</th>
</tr>
</thead>
</table>

Download Files for: CAIR_Query

- Inbound Query File (1KB)
- Outbound Demographic File (1KB)
- Outbound Immunization File (1KB)

Summary Information for: CAIR-HMO_Query

<table>
<thead>
<tr>
<th>Description</th>
<th>Patient</th>
<th>Immunization</th>
<th>Comment</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Data Exchange CAIR 133
Use of the Check Status

Your clinic can monitor ongoing Data Exchange activity using the Check Status functionality available to Power or DX Quality Assurance users.

1. Click **Check Status**.
2. Set the time period whether ‘Realtime?’ in the choices
3. 

<table>
<thead>
<tr>
<th>Exchange Data Status</th>
<th>Past 7 Days</th>
<th>Realtime?</th>
<th>Status</th>
</tr>
</thead>
</table>

4. The Exchange Data Check Status screen will contain the job name, user name, exchange data date, process start and end date and status of recent jobs.
5. Click **Refresh** periodically to check the status of the job, it will not automatically update.
6. When a job is complete, the job name will appear as a hyperlink. Under the status column, one of three messages may appear.
   a. Complete: the job has completed processing
   b. Error: the job could not be processed because of formatting errors
   c. Exception: the job could not be processed because of an internal system error
7. Click the job name hyperlink.
8. If the job completed successfully, the Job Detail screen will display. This screen contains the following three sections:
a. Download Files for: <Job Name>: This section contains all output files available for you to download including the Response Files and any "CAIR IIS to provider organization" download files. Click on the download name hyperlink to download the file. Under the HL7 251 Response link, there is a link to the file that was uploaded into Data Exchange, Inbound HL7 251 File. Similar links appear for jobs using HL7 2.4, flat file and CSV file formats.

b. Download Log for: <Job Name>: This section contains information regarding activity of the download file(s) including file name, user name, date, and time of the download(s).

c. Summary Information for: <Job Name>: This section contains a summary of all the information pertinent to the exchanged data file received and processed.

9. Review the summary figures to ensure complete uploads. The response files can be searched for record rejections.

10. Patients put into pending file are reviewed and merged (where a client already exists in the system). Once merging is complete, data are viewable in the IIS.

If the job did not complete successfully, the Job Error screen will display. This screen will contain an explanation of why the exchange data could not be processed the original uploaded file(s) and information regarding the activity of the downloaded file(s).
Check Status

Your clinic can monitor ongoing Data Exchange activity using the Check Status functionality available to Power or DX Quality Assurance users.

11. Click **Check Status**.
12. Set the time period whether ‘realtime’ in the choices

<table>
<thead>
<tr>
<th>Job Name</th>
<th>User Name</th>
<th>Exchange Data Date</th>
<th>Process Start Date</th>
<th>Process End Date</th>
<th>Status</th>
</tr>
</thead>
</table>

13. The Exchange Data Check Status screen will contain the job name, user name, exchange data date, process start and end date and status of recent jobs.
14. Click **Refresh** periodically to check the status of the job, it will not automatically update.
15. When a job is complete, the job name will appear as a hyperlink. Under the status column, one of three messages may appear.
   a. Complete: the job has completed processing
   b. Error: the job could not be processed because of formatting errors
   c. Exception: the job could not be processed because of an internal system error
16. Click the job name hyperlink.
17. If the job completed successfully, the Job Detail screen will display. This screen contains the following three sections:
a. **Download Files for: <Job Name>:** This section contains all output files available for you to download including the Response Files and any "CAIR IIS to provider organization" download files. Click on the download name hyperlink to download the file. Under the HL7 251 Response link, there is a link to the file that was uploaded into Data Exchange, Inbound HL7 251 File. Similar links appear for jobs using HL7 2.4, flat file and CSV file formats.

b. **Download Log for: <Job Name>:** This section contains information regarding activity of the download file(s) including file name, user name, date, and time of the download(s).

c. **Summary Information for: <Job Name>:** This section contains a summary of all the information pertinent to the exchanged data file received and processed.

18. Review the summary figures to ensure complete uploads. The response files can be searched for record rejections.

19. Patients put into pending file are reviewed and merged (where a client already exists in the system). Once merging is complete, data are viewable in the IIS.

If the job did not complete successfully, the Job Error screen will display. This screen will contain an explanation of why the exchange data could not be processed the original uploaded file(s) and information regarding the activity of the downloaded file(s).
Chapter 12 School User

In this chapter:

Finding Student
Student Immunization Record
Manage List
Reports/Client List
Check School Report
Finding Student Screen
The Find Student screen is used to search and locate any student existing in the CAIR application any two search fields in the search screen.

There are two main sections used in the Find Student screen:

- Enter Search Criteria for a Student

<table>
<thead>
<tr>
<th>Student Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search by Patient</td>
</tr>
<tr>
<td>* Minimum search criteria includes any two fields.</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Middle Name</td>
</tr>
<tr>
<td>Birth Date</td>
</tr>
</tbody>
</table>

**Search by Medical Record Number**

* Medical Record Number

**Search by CAIR ID**

* CAIR ID

**Search by Legacy CAIR ID**

* Legacy CAIR ID

Search Criteria

1. Click **Find Student** under the School Access menu group on the left side of the screen.
2. In the Student Search Criteria box you search using any two fields unless you are using Medical Record Number, CAIR ID or Legacy CAIR ID.
   a. Last Name: Entering at least the first two letters of the student’s last name, along with the birth date, will begin a search of all students whose last name begins with those letters.
   b. First Name: Entering at least the first two letters of the student’s first name, along with the birth date, will begin a search of all students whose first name begins with those letters. If a student’s first name is only one letter long, you may enter the single letter, but only exact matches will be displayed.
   c. Middle Name: Entering at least the first two letters of the student’s middle name, along with the birth date, will begin a search of all students whose middle name begins with those letters. If a student’s middle name is only one letter long, you may enter the single letter, but only exact matches will be displayed.
   d. Mother’s First Name: Entering at least the first two letters of the mother’s first name, along with the birth date, will begin a search of all students whose mother’s first name begins with those letters. If the mother’s first name is only one letter long, you may enter the single letter, but only exact matches will be displayed.
e. Phone: Entering the student’s main 7-digit phone number (area code not required) and birth date will identify individuals with the exact phone number in CAIR. However, this method is not recommended, as a phone number may not be entered for a student, and phone numbers may change over time.

3. Click the Find button.

Entering Names
On all first and last names entered into CAIR for student searches, CAIR disregards spaces, apostrophes, and hyphens entered.

Search Results
List of Possible Matches
A list of possible matches means the search returned more than one student match. All possible student matches returned are then displayed in a table. The student result table is sorted alphabetically by last name; first name, middle name, birth date, and gender are also included in the table for each student. Using the information displayed for each of the students in the table, the student can be selected by clicking on the Last Name. The Student Immunization Record screen is then displayed containing the student immunization information.

No Match Found
Please try at least twice to be sure the student is not in the system. For example, you can search once using the date of birth and last name, and once using date of birth and first name. Parents may have immunization information but if the child was born in another state or received services from a provider who did not report to CAIR, the information may not be in CAIR. A blank CIS form is available from the forms list.

Threshold Limit
When searching in the database, if the number of students exceeds 75 matches, then no students will be listed. Instead, the following message will display:

"XX students were found. Please refine your search criteria to limit your student list." (XX is the total number of students found in the search.)

In the unlikely event you receive this message, clear your search criteria and try again with information that is more detailed.

Student Immunization Record Screen
The Student Immunization Record screen displays a student’s immunization history and provides immunization recommendations. From this screen, you are able to select and add the student to a specific student list. This will allow you to run reports that include the student.
There are three main sections used in the Student Immunization Record screen:

- **Student Information**
- **Immunization Record**
- **Vaccines Recommended**

### Student Information

The Student Immunization Record screen displays a student information header at the top of the page. This section includes student name, date of birth (DOB), gender, and selected tracking schedule. The information contained in this section can be used to confirm that you have located the correct student.

### Tracking Schedule

Select the appropriate tracking schedule from the drop down menu. This function allows users to change the tracking schedule to evaluate the record according to school law requirements based on the grade of the student. If a grade level tracking schedule is selected, the Earliest Date,
Recommended Date and Past Due Date will be the same and identify vaccines for which the student is incomplete according to school requirements. ACIP is the clinical schedule and is the default. The ACIP schedule should be used when printing out a record for the parent so they know when they can obtain immunizations for their child.

CSIR Blue Card Report
Clicking on the **CSIR Blue Card** button will allow users to print Blue Card Report

---

**CALIFORNIA SCHOOL IMMUNIZATION RECORD**

This record is part of the student’s permanent record, maintained as required by Section 49608 of the Education Code and shall transfer with that record. Local health departments will design and print immunization record in schools, child care facilities, and family day care homes.

This record must be completed by school and health care personnel from an immunization record provided by parent or guardian. See reverse side for instructions.

<table>
<thead>
<tr>
<th>Student Name</th>
<th>PATIENT, MIKE TEST</th>
<th>Sex</th>
<th>M</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Parent or Guardian</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daytime</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nighttime</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>6121</td>
<td>City</td>
<td>SAN FRANCISCO</td>
<td>ZIP</td>
</tr>
</tbody>
</table>

### VACCINE

<table>
<thead>
<tr>
<th>VACCINE</th>
<th>DATE EACH DOSE WAS GIVEN</th>
<th>1st</th>
<th>2nd</th>
<th>3rd</th>
<th>4th</th>
<th>5th</th>
<th>6th</th>
<th>Disease</th>
</tr>
</thead>
<tbody>
<tr>
<td>POLIO (OPV or IPV)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DTP/DTaP/DT/Td</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MMR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HIB (Required only for child care and preschoo)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEPATITIS B</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VARICELLA (Chickenpox)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEPATITIS A (Not required)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**CHEST X-RAY (Necessary if skin test positive)**

- **Type**
  - PPD Mantoux
  - Other
- **Date given**
  - 06/01/2016
  - 06/02/2016
- **Date read**
  - 06/01/2016
  - 06/02/2016
- **Skin test positive**
  - Yes
  - No
- **Reaction after 48-72 hours**
  - Yes
  - No

---

**TB SKIN TESTS**

<table>
<thead>
<tr>
<th>Type**</th>
<th>Date given</th>
<th>Date read</th>
<th>Reaction</th>
<th>Chest X-Ray</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPD Mantoux</td>
<td>06/01/2016</td>
<td>06/02/2016</td>
<td>Positive</td>
<td>Yes</td>
</tr>
</tbody>
</table>

---

**DOCUMENTATION**

- I certify that I reviewed a record of the child’s immunizations and transmitted it accurately.
- Date
- Staff
- Signature
- Parent Signed Yes/No

**STATS OF REQUIREMENTS**

- A. All Requirements are met
- B. Currently up to date, but more doses are due on this date
- C. Medical Exemption - Permanent
- D. Medical Exemption - Temporary
- E. Personal Belief
- F. Not required

---

**7TH GRADE ENTRY**

- A. All Requirements are met
- B. Currently up to date, but more doses are due on this date
- C. Medical Exemption - Permanent
- D. Medical Exemption - Temporary
- E. Personal Belief

---

**Signatures**

- Date
- Staff
- Signature
- Parent Signed Yes/No
INSTRUCTIONS FOR SCHOOL OR CHILD CARE STAFF

1. Complete child’s name and address information section, or ask parent or guardian to complete this section only. (This form is not to be sent home or given to parents to complete.)
2. School or child care personnel then fill in date (month/day/year) of each immunization the student has received from the Immunization Record presented by the parent or guardian. (If the date consists only of month and year for some doses, fill in month/day/year; however, if either measles, rubella or mumps (or MMR) was received in the month of the 1st birthday, month/day/year is required.)
3. Determine if immunization requirements have been met, using the California "Immunization Requirements for Grades K-12," or "Immunization Requirements for Child Care.", (available from Immunization Coordinators in local health departments), or other requirements guide.
4. Complete the Documentation and Status of Requirements box.
   A. Check the Permanent Medical Exemption (PME) box(es) for vaccines that are exempt for medical reasons. File the required physician's written statement specifying the exempted immunization(s) in the pupil's record.
   B. If the child has met all immunization requirements, check box A and write in date.
   C. If the child has not met all requirements, check box B. Child can be admitted only if up-to-date, e.g., no immunizations due currently. The child must be followed up as indicated in the "Guide to Immunization Requirements."
   D. If a child is to be exempted for medical reasons, a doctor's written statement is required; the statement must include which immunization(s) is to be exempted and the specific nature and probable duration of the medical condition. If the medical exemption is permanent, the requirement for the designated immunization(s) is met: check box A and box C. If the medical exemption is temporary, check box B and box D. This child must be followed up.
   E. If a child is to be exempted for reasons of personal beliefs, the parent or guardian must present documentation consistent with Health and Safety Code Section 120365, including documentation of all other required immunizations the child has received. All requirements are met: check box A and box E.

Applicable only in those jurisdictions where the Tuberculosis Assessment is required for school entry

Print Confidential
This button allows you to print the record showing on the screen. This record may be helpful for parents when scheduling immunizations for their child.

Cancel
This button cancels the screen and takes you back to the previous screen.

Adding Students to a Report List

To add a student to a list, you must have first created specific student report lists in the Manage Lists section of the application. See the Manage List Screen section of this chapter for details.

1. Click the “Please pick a Report List” drop-down menu and select your list from the available options.
2. Then click the “Add this Student to a Report List” hyperlink.
   a. Students can be added to more than one list.
Student Immunization Record

The Immunization Record table lists all vaccinations the student has received to date. Immunizations listed in the table are ordered alphabetically first, then by 'Date Administered'. The table columns are defined as follows:

- **Vaccine Group** - Lists the vaccine group name for each immunization received.
- **Date Admin** - Lists the date the student received the vaccine.
- **Series** - Denotes the sequence number within the immunization series and contains messages such as "Not Valid", if the vaccine does not meet the requirements of the selected tracking schedule.
- **Trade Name** - Displays the trade name of the vaccination received.
- **Dose** - Indicates whether full, half, or multiple doses were administered to the student. A blank field is the default for a full dose.

**Note:**
Doses marked as Subpotent or Not Valid are counted for school/children’s facility immunization law compliance. The exceptions are MMR, Varicella, and Hepatitis A doses given before the first birthday. California accepts these dates for school attendance purposes because revaccination is a clinical decision.

The student's age appears in a solid blue field between the student information and reports sections.

**Vaccines Recommended**

Find the recommended vaccinations and corresponding dates for the student in the Vaccines Recommended by Selected Tracking Schedule table. The vaccine group list shows all vaccinations included in the tracking schedule assigned to this student. Note: the dates reflect the ACIP schedule. The table columns are defined as follows:

<table>
<thead>
<tr>
<th>Vaccine Group</th>
<th>Displays the vaccine group name.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccine</td>
<td>Displays the specific vaccine name.</td>
</tr>
<tr>
<td>Earliest Date</td>
<td>Displays the earliest date the student could receive the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Earliest Date will be when the student is incomplete for the vaccine according to California school law requirements.</td>
</tr>
<tr>
<td>Recommended Date</td>
<td>Displays the date that the student is recommended to receive the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Recommended Date will be when the student is incomplete for the vaccine according to California school law requirements.</td>
</tr>
<tr>
<td><strong>Past Due Date</strong></td>
<td>Displays the date that the student is past due for the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Past Due Date will be when the student is incomplete for the vaccine according to California school law requirements.</td>
</tr>
</tbody>
</table>

---

**Note:**

The Earliest Date, Recommended Date, and Past Due Date are the same if a school or children's facility grade level tracking schedule is selected. Students are incomplete for that vaccine starting on this date. The Earliest Date is the recommended date for the student to receive the vaccine.

The dates found in the Vaccines Recommended by Selected Tracking Schedule table are shaded with color for emphasis. The colors applied to the dates within the columns are defined as follows:

- **Green:** fills the background when the current date is on or after the recommended or past due date.
- **Grey:** fills the background when a vaccine cannot be given because that immunization series is complete, contraindicated, maximum age exceeded, or the patient has immunity or medical exemption.

**Maximum Age Exceeded:** reflects whether a student has exceeded the maximum age to receive a specific vaccine. For example, if a student has already reached the age of five and has not completed the Hib series, then the recommendation for Hib at the bottom of the student immunization history will show Maximum Age Exceeded.

**Maximum Doses Met or Exceeded for Vaccine Group:** indicates that the maximum number of doses recommended have been administered for the specified vaccine series according to the tracking schedule.

**Complete:** indicates that an immunization series has been completed according to the tracking schedule.

**Immunity Recorded for Vaccine Group:** indicates history of disease or vaccine history. If this message appears for varicella, this should be treated as history of chickenpox disease. A medical exemption is required if this message appears for any vaccine other than varicella.

**Contraindicated:** indicates history of disease, or the vaccine should not be given for medical reasons. If this message appears for varicella, this should be treated as history of chickenpox disease. A medical exemption is required if this message appears for any vaccine other than varicella.
Note:
Religious exemptions are not recorded in CAIR and are not displayed.

Printing a CSIR Blue Card Immunization Record Form

To print out a record in the format of CSIR Blue Card for your school files:

1. Click the School Record button
2. Click File and then click Print

To print out the Student Immunization Record screen:

1. Click the Print Confidential button.
2. Click File and then click Print.

This page can be used to look at dates when students will be due for vaccines.
Click the Back button on your browser to return to the student record.

Manage List Screen
The Manage List screen is used to create new and manage existing student lists to be used for generating reports. A maximum of thirteen lists can be created by each school.

There are two main sections used in the Manage List screen:
- Manage List
- Report List

Each school can only have 13 report lists.

<table>
<thead>
<tr>
<th>Manage List</th>
</tr>
</thead>
<tbody>
<tr>
<td>New List Name</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Report List</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Name</td>
</tr>
<tr>
<td>------------</td>
</tr>
<tr>
<td>GraduationYear2014</td>
</tr>
</tbody>
</table>

Manage List Creates new lists for your school or children’s facility organization in CAIR.

Report Lists Displays a table of all lists added to CAIR by your school or children’s facility in alphabetical order.
Report List Fields

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>List Name</strong></td>
<td>Displays the name given to the list by your school. If you click the name, you can view a detailed display of your students within the list.</td>
</tr>
<tr>
<td><strong>Last Updated Date</strong></td>
<td>Displays the date on which the list was last updated.</td>
</tr>
<tr>
<td><strong>Student Count</strong></td>
<td>Displays the number of students within the list. The count is determined by how many students are assigned to the list.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Displays a delete button for each list. If you click the delete button, the list will be deleted.</td>
</tr>
</tbody>
</table>

**Note:**
Once you delete a list, you cannot retrieve it. Deleting a list removes all students from the list.

Creating a New Student List

1. Click **Manage Lists** under the School Access menu group on the left side of the screen.
2. Enter a list name in the New List Name text field.
3. Click the **Save** button to add the list name.
4. The message will appear at the top, “The list has been created successfully”. An example of a list name may be: Class of 2015. You will later add students to this list.

**Note:**
Once you create a list, you cannot edit the name of it. Make sure to choose a list name that will not need to be revised (avoid generic names or current references such as kindergarten). Instead, use titles such as Class of 2020, Class of 2021, etc., using the year of high school graduation.

Removing a List

1. Click the **Delete** button to the right of the list.
2. When the Delete button is clicked, you will be given a prompt “Are you sure you want to delete this list?” Your option is either **OK** or **Cancel**.
3. Clicking **OK** will delete the list and remove it from the Manage List screen. Clicking on **Cancel** will cancel the delete and return you to the Manage List screen.

Opening the Reports/Client List Screen
1. Click a list name for the list you wish to view.
2. You will be taken to the Reports/Client List screen where you can view your student list. Further explanation can be found on the Reports/Client List Screen section, below.

**Note:**
You can only view details of a list that contains students. A list with zero count will not link to the Reports/Client List screen.

**Reports/Client List Screen**
The Reports/Client List screen is used to view students added to your school list and run reports for the students in the list. You can also view a student's immunization record and remove a student from your list.

There are three main sections used in the Reports/Client List screen:
- Reports Available: (List Name)
- Select Tracking Schedule
- Client List for: (List Name)

### Reports Available for Schools

This section can generate three student reports within the selected list:
<table>
<thead>
<tr>
<th><strong>Student List</strong></th>
<th>Displays the name and date of birth for each student on the list, sorted alphabetically by last name.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student Immunization History</strong></td>
<td>Displays the name, date of birth, and immunization history for each student on the list, sorted alphabetically by last name.</td>
</tr>
<tr>
<td><strong>Immunization Due</strong></td>
<td>Displays the name, date of birth, and all immunizations due for each student on the list, sorted alphabetically by last name.</td>
</tr>
<tr>
<td><strong>Student Compliance Report</strong></td>
<td>Displays the student compliance based on the school tracking schedules pick list</td>
</tr>
</tbody>
</table>

**Select Tracking Schedule**

Choose the appropriate tracking schedule from the drop down menu. This function allows users to set the tracking schedule for each report in order to evaluate all of the records of all the students listed based on the school law requirements for their grade level to identify those students who are incomplete.

**Generating the Student List Report**

1. Click the **Student List** link.
2. The Student List report will open in a PDF document.
3. Click the Back button on your browser to return to the Reports/Client List screen.

**Generating the Student Immunization History List Report**

1. Click the **Student Immunization History List** link. You will be taken to the Check School Report screen where you can view the status of the report you are running.
2. Click **Refresh** periodically until the status displays 100%. You can also click “Check School Report” on the menu on the left side to see if the report is finished.
3. Once your report has finished generating, the report name will turn blue, and the report status will display “ready”. You can now click the link and view the report.
4. The report displays the immunization history and the recommended vaccines for each student on your list according to the Tracking Schedule selected on the Reports/Client List screen.
5. Click the Back button on your browser to return to the Reports/Client List screen.

**Generating the Immunizations Due List Report**

When requesting the Immunization Due report you will be taken to a screen where you can enter criteria used for the report. The criteria for this report are explained below.
Selecting Vaccine Groups

The majority of the time, you will Click Use All Vaccine Groups. The immunization due dates will be based on the tracking schedule you have selected for this report. If a student is past due for any of the vaccines in the tracking schedule (for example, if he/she is past due for any vaccines required for kindergarten and you have selected the Kindergarten tracking schedule), then he or she will be included in the report outcome, given all other report criteria are met. If no students are listed in the report, then all students on the list are complete or up-to-date for the selected date range.

Choosing vaccine groups allows you to focus on a specific vaccine(s) within the selected tracking schedule. If the student is past due for any of the selected vaccine groups, then he or she will be included in the Immunizations Due List report, given all other report criteria are met. For example, you can use this report if you want to see which students on the list are due for a specific vaccine or if there is an outbreak of disease and you need to identify students on your list that may be lacking that vaccine. This report could be used to produce a list of susceptible students at your school or children’s facility if all of the students attending your school/facility have all of their immunization dates in CAIR.

1. Within the Select the Vaccine Group(s) section, select either **Use All Vaccine Groups** or **Use Vaccine Groups Selected**.
   a. If the Use Vaccine Groups Selected option is selected, choose the vaccine groups to be included.
2. Scroll though the vaccine group list and double-click the desired vaccine group name, or click the vaccine group name and then click the Add button.
   a. All selected vaccine groups will appear in green in the box to the right.
3. To remove any vaccine groups from the report criteria, either double-click the selected vaccine group name in the right list box, or click the selected vaccine group name and then click the Remove button.

When the report is generated, the only students that will appear on the list are those students who are due for the vaccine group(s) selected in the report criteria, but the report will show all vaccines included in the tracking schedule.
Selecting Target Date Range
When dates are specified, the report will only return those students that were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered.

Note:
The To date in the target date range may be set to the day your report is due to the local health department to identify students who will be due for a vaccine by this date.

4. Enter the Target Date Range in the From and To text boxes in the form MM/DD/YYYY, or Click the calendar icon to set the date.
   a. The From date, To date, or both dates can be left unspecified:
      i. If the To date is unspecified for the Target Date Range, the report date range will include the From date up to and including today's date.
      ii. If the From date is unspecified for the Target Date Range, the report date range will include all dates prior to and including the To date.
      iii. If both dates are left unspecified for the Target Date Range, then today's date will be entered for both From and To fields.

5. Click Generate.
   a. You will be taken to the Check School report screen where you can view the status of the report you are running.

6. Click Refresh periodically until the status displays 100%. You can also click “Check School Report” on the menu on the left side to see if the report is finished.
   a. Once your report has finished generating, the report name will turn blue, and the report status will say “ready”.

7. Click the link and view the report, which displays the Immunizations Due for each student on your list.
   a. If you selected a future date, then all children on the list will require vaccines by the date selected, but Due will only be displayed for those vaccines that are past due or due now. You will have to manually evaluate the rest of the record to identify those vaccines that are due before the future date selected.

8. Compare to see if all of the student’s immunizations are in the CAIR if you have information from another source.
   a. Parents may have additional information if the child was born in another state or received services from a provider who did not report to CAIR.
   b. Additional dates can be written on the printed CIS form but will not be reflected in the Immunizations Due report for students.
   c. The CAIR forecast does not consider any vaccines that the parent has selected as a religious exemption.

Note:
There are two places in the CAIR where you can select a tracking schedule. If you want to run a report for a group of students using a specific tracking schedule, such as Kindergarten, select the tracking schedule on the Reports/Client List screen. If you want to see the immunizations due for
one student only, find the student and then select the tracking schedule on the Student Immunization Record screen.

Generating the Student Compliance Report

1. Select the appropriate Tracking Schedule from the Tracking Pick List

2. Click on the Student Compliance Report
3. Select the date range you wish to run against the student list and tracking schedule

3.1 The Date range will measure the student compliance for the students during the range selected.
**Client List**

This section is for viewing student immunization records and removing a student from your list. Information contained within the student list table is described below.

<table>
<thead>
<tr>
<th>Delete</th>
<th>If you wish to remove a student from your list, place a checkmark in the box beside the student's name in the Delete column. Remove more than one student at a time by checking multiple students. Next, Click the Delete button. Once you have confirmed the delete, a message will display &quot;The list has been updated successfully&quot; and your student(s) will be removed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Displays the student's last name and provides a link back to the Student Immunization History screen.</td>
</tr>
<tr>
<td>First Name</td>
<td>Displays the student's first name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Displays the student's middle name.</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Displays the student's birth date.</td>
</tr>
</tbody>
</table>

**Check School Report Screen**

The Check School Report screen is used to display and/or determine the status of a report request. The screen is separated into two sections:

- **School Report Job Status**
- **School Report Status**

**School Report Job Status**

This section displays the date and time a report was started and completed, the overall status in percentage, the number of students returned and the target date range if one was specified. Status will update by clicking the Refresh button. You can only have one job listed in this section. Once you run a new report, your previous job will be erased.
School Report Status

This section displays reports generated from the Reports/Client List screen. It contains the name of the report, the type of report, the date and time the report was requested, what time it started and the status. Your reports will be sorted by time generated, with the latest report at the top.

To get the latest update on all the requests listed in the table, click the Refresh button. This will show the most current status for each request from the CAIR database.

You do not have to remain on this screen while the reports are running. You can navigate away from this screen and go somewhere else in the application while your report runs in the background. To get back to the School Report Status screen, Click the Check School Report link on the left menu panel.

As soon as the report name appears as a hyperlink and the Status displays ready, it has completed processing and is ready for viewing. To view the report, Click the report name hyperlink. This process can take some time depending on the size of the report. The selected report will automatically display using the Adobe Acrobat Reader. If there is a problem viewing your report, please contact the CAIR Help Desk. At any time, click the Cancel button to return to the screen you were previously on.
Appendix 1

In the Appendix:

Online Help
CAIR Help Desk
Online Help

The CAIR online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in CAIR by pressing the yellow light bulb on the menu bar in the top right corner of the screen.

Screen-Specific Help

To access screen-specific help, follow these steps:

When on any screen where you would like help, click on the light bulb on the menu bar located at the top-right of the screen. A box with screen-specific help information will display. This help box may have any or all of the following features:

- **Purpose**: describes what the screen is meant to do or what kind of information needs to be entered.
- **Information provided**: describes in detail the input and output fields that are found on the screen.
- **Functionality**: provides information about specific buttons on the screen and describes their function.
- **Results**: describes the outcome of a search, report, download, or other information entered into the database.
- **User tips**: has advice or further information on how to use this screen.

To view these features, you may either click the links under the Purpose section or scroll down the page. To close the help box, press the X button in the top right corner of the box.

General Help

General help contains information on screens throughout CAIR. You may access this information by viewing the contents of general help, by viewing or searching the general help index, or by searching general help using a keyword.

Contents of General Help

To access the contents of general help follow these steps:

1. Click the light bulb on the menu bar.
2. Click **Help Contents** in the top left corner of the help box.
3. A box may open asking if you want to display both secure and non-secure items; click the **Yes** button.
4. The General Help screen now displays. On the left side of the page, view a list of topics, each with its own book-shaped icon.

5. Select a topic. A list of help items with question mark icons will display. You may also see further subtopics, each with its own book-shaped icon.

6. The help information you selected will display on the right side of the General Help screen.

7. Use the links at the top of the screen or scroll down to view the information you need.

8. To return to a previous help screen or to skip ahead one screen, use the browser’s Back and Forward buttons.

9. To collapse a topic, select it or click on the book icon next to it. You may toggle back and forth between opening and closing a topic by clicking on the book icon.

10. To close out of the help box, click the X in the top right corner of the box.

Viewing/Searching the General Help Index

To view or search the general help index follow these steps:

1. Follow Steps 1-3 under Contents of General Help.

2. Click the Index button on the top left side of the General Help screen.

3. To find an index topic, use the scroll bar to view index topics.

4. Click one of the help items to view the item.

5. The help information you selected will display on the right side of the General Help screen.

6. To return to a previous help screen or to skip ahead one screen, use the browser’s Back and Forward buttons.

7. To close out of the help box, click the X in the top right corner of the box.

CAIR Help Desk

If you are experiencing difficulties or have questions regarding CAIR, you may contact the CAIR Help Desk.

The CAIR Help Desk hours are 8:00 a.m. to 5:00 p.m. Monday through Friday.

• Help Desk telephone number: 800-578-7889
Appendix 2

In the Appendix:

Validation of Patient Entry Data
Disallowed Address Entries
Disallowed First Names
Disallowed Last Names
Validation of Patient Entry Data
CAIR validates the information you enter on the patient screen when you attempt to save the entries. If you have entered data that CAIR considers invalid, a message will appear asking you to re-enter data in the field(s). Validation varies depending on the field. Refer to the chart below for information on validation of data in various fields.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Web Page/Section</th>
<th>Characters Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/ Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes. Do not save an entry that matches a disallowed name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/ Personal Information</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/ Personal Information</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.</td>
</tr>
<tr>
<td>Mother's First Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/ Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Mother's Maiden Last Name</td>
<td>Enter New Patient/Personal Information, Manage Patient/ Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Responsible Party First Name</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Responsible Party Middle Name</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods.</td>
</tr>
<tr>
<td>Responsible Party Last Name</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Street Address</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.</td>
</tr>
<tr>
<td>Other Address</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.</td>
</tr>
<tr>
<td>PO Box</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow alpha or numeric characters, backslashes, number symbols, dashes, and periods. Do not save an entry that matches a disallowed address. Do not save quotes.</td>
</tr>
<tr>
<td>E-mail Address</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Must contain &quot;@&quot; symbol and period. Do not save quotes.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow only numeric characters and dashes. Do not save quotes.</td>
</tr>
<tr>
<td>City</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, and apostrophes. Do not save quotes.</td>
</tr>
<tr>
<td>Zip</td>
<td>Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)</td>
<td>Allow only numeric characters. Do not save quotes.</td>
</tr>
</tbody>
</table>
### Disallowed Address Entries

<table>
<thead>
<tr>
<th>Disallowed Address Entries</th>
<th>Disallowed Address Entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>DO NOT USE</td>
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</tr>
<tr>
<td>UNKNOWN</td>
<td>MOVED</td>
</tr>
<tr>
<td>GENERAL DELIVERY</td>
<td>UPDATE</td>
</tr>
<tr>
<td>DECEASED</td>
<td>MAIL RETURNED</td>
</tr>
<tr>
<td>ADDRESS</td>
<td>COMMENT</td>
</tr>
<tr>
<td>FAMILY PLANNING</td>
<td>FAMILY PLANNING SERVICES</td>
</tr>
<tr>
<td>PLANN PARENTHOOD</td>
<td>PLANNED PARENTHOOD</td>
</tr>
</tbody>
</table>

### Disallowed First Name Entries

The following chart lists first name entries that will not be validated in CAIR.

<table>
<thead>
<tr>
<th>Disallowed First Names</th>
<th>Disallowed First Names</th>
<th>Disallowed First Names</th>
<th>Disallowed First Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADOPT</td>
<td>HBS</td>
<td>LSS</td>
<td>UNK</td>
</tr>
<tr>
<td>ADOPTIVE</td>
<td>HRH</td>
<td>LSS BABY</td>
<td>UNKN</td>
</tr>
<tr>
<td>AF BABY</td>
<td>I</td>
<td>LWG</td>
<td>UNKNOWN</td>
</tr>
<tr>
<td>BB</td>
<td>ILLEGIBLE SIGNATURE</td>
<td>MALE</td>
<td>UNKN</td>
</tr>
<tr>
<td>BABY</td>
<td>INFANT</td>
<td>MR</td>
<td>UNKN</td>
</tr>
<tr>
<td>BABY B</td>
<td>INFANT BO</td>
<td>MRS</td>
<td>UNNAMED</td>
</tr>
<tr>
<td>BABY BOY</td>
<td>INFANT BOY</td>
<td>MS</td>
<td>UNREADABLE</td>
</tr>
<tr>
<td>BABY G</td>
<td>INFANT FE</td>
<td>NEWBORN</td>
<td>V</td>
</tr>
<tr>
<td>BABY GIRL</td>
<td>INFANT FEM</td>
<td>NFN</td>
<td>WLCFS</td>
</tr>
<tr>
<td>BABYB</td>
<td>INFANT G</td>
<td>NTXHW</td>
<td>XWM</td>
</tr>
<tr>
<td>BABYBOY</td>
<td>INFANT GI</td>
<td>PARENT</td>
<td>XXX</td>
</tr>
</tbody>
</table>
## Glossary

### Disallowed First Names

<table>
<thead>
<tr>
<th>First Name</th>
<th>Nickname</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>BABYGIRL</td>
<td>INFANT GIR</td>
<td>PARENTS</td>
</tr>
<tr>
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<td>INFANT GIRL</td>
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</tr>
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<td>BOY</td>
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<td>PVN</td>
</tr>
<tr>
<td>BOY I</td>
<td>INFANT M</td>
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</tr>
<tr>
<td>BOY II</td>
<td>INFANT MA</td>
<td>SLKDFSLKD</td>
</tr>
<tr>
<td>CHILD</td>
<td>INFANT MAL</td>
<td>SRM</td>
</tr>
<tr>
<td>CSS</td>
<td>INFANTBOY</td>
<td>THWJ</td>
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<tr>
<td>FEMALE</td>
<td>INFANTGIR</td>
<td>TOMORROW'S CHILDREN</td>
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<td>INFANTGIRL</td>
<td>TSWJ</td>
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<td>INFANTMAL</td>
<td>TSWM</td>
</tr>
<tr>
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<td>TSWV</td>
</tr>
<tr>
<td>GIRL II</td>
<td>LCFS</td>
<td>TXWM</td>
</tr>
</tbody>
</table>

### Disallowed Last Name Entries

The following chart lists last name entries that will not be validated in CAIR.

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<thead>
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<th>Last Name</th>
<th>Nickname</th>
<th>Additional Information</th>
</tr>
</thead>
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<td>ADOPT</td>
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<td>LSDKFSLDK</td>
</tr>
<tr>
<td>ADOPTIVE</td>
<td>CSSW</td>
<td>LSS</td>
</tr>
<tr>
<td>A BABY</td>
<td>D S S</td>
<td>LSSFC</td>
</tr>
<tr>
<td>A F BABY</td>
<td>DCS</td>
<td>LTJR</td>
</tr>
<tr>
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<td>DFS</td>
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<td>MALE</td>
</tr>
<tr>
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<td></td>
<td>V</td>
</tr>
<tr>
<td></td>
<td></td>
<td>V</td>
</tr>
<tr>
<td></td>
<td></td>
<td>V</td>
</tr>
</tbody>
</table>

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Glossary  
CAIR  
161
<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AF BABY GI</strong></td>
<td><strong>F BABY</strong></td>
<td><strong>NEWBORN</strong></td>
<td><strong>WLCFS</strong></td>
</tr>
<tr>
<td><strong>AFBABY</strong></td>
<td><strong>FF</strong></td>
<td><strong>NLN</strong></td>
<td><strong>ZBABY</strong></td>
</tr>
<tr>
<td><strong>B C S</strong></td>
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<td><strong>UFA</strong></td>
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<td><strong>FWV</strong></td>
<td><strong>PBABY</strong></td>
<td></td>
</tr>
<tr>
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<td><strong>G BABY</strong></td>
<td><strong>PCS</strong></td>
<td></td>
</tr>
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<td><strong>GARCIA INF</strong></td>
<td><strong>PENDING</strong></td>
<td></td>
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<td><strong>GIRL</strong></td>
<td><strong>RBABY</strong></td>
<td></td>
</tr>
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<td><strong>SBA</strong></td>
<td></td>
</tr>
<tr>
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</tr>
<tr>
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<td><strong>BCSW</strong></td>
<td><strong>INFANT</strong></td>
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<td><strong>INFANTBOY</strong></td>
<td><strong>SRB</strong></td>
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<td><strong>INFANTGIRL</strong></td>
<td><strong>SRFC</strong></td>
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<td><strong>LS</strong></td>
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<td></td>
</tr>
</tbody>
</table>
Glossary

**ACIP**
Advisory Committee on Immunization Practices. Along with the Centers for Disease Control and Prevention (CDC), provides written recommendations on the administration of vaccines to adults and children in the United States. These recommendations include a schedule of dosage, contraindication, and periodicity information for each vaccine. This "harmonized schedule" is the default schedule within NYSIIS.

**Bookmark**
A browser tool used for accessing Web sites quickly. After setting a bookmark at a Web page, you may return to that page simply by clicking on its bookmark, rather than entering the entire Web address. Also known as a favorite.

**Browser**
A software program you use to access the Internet.

**CoCASA**
Comprehensive Clinic Assessment Software Application. A tool developed by the Centers for Disease Control and Prevention (CDC) used for assessing immunization levels of patients for an immunization provider.

**CDC**
Centers for Disease Control and Prevention. The CDC is the lead federal agency for protecting the health and safety of people, providing information to enhance health decisions.

**Clinician**
A person who provides a health care service and for the purposes here would administer an immunization; for example, a nurse.

**Consent**
California authorizes medical care providers to submit patient data to CAIR under the condition that the patient (or parents) are disclosed and informed of their right to decline to share their data with other CAIR users.

**Custom Flat File Template**
A customized layout, specifying fields and field lengths, for performing data exchange.

**Data exchange**
The process of submitting or receiving immunization data from CAIR electronically.

**Deduplication**
An automatic process that displays potential patient matches to help ensure that patient records are not duplicated in CAIR.

**Desktop**
The default screen on your computer that displays when no programs are open. The desktop contains shortcut icons that allow the user to open the represented programs and files from the desktop screen.

**Favorite**
See Bookmark.

**Grace period**
The default period of time prior to and following an immunization. This time period is used to validate a patient's immunization history; it does not affect immunization recommendations.

**Historical Doses**
Doses that the patient received, but it is unclear which organization in the registry, if any, actually administered the dose. (See also...
CAIR Inventory Doses and Other Owned Doses.)

**HL7**
Health Level 7. A method of categorizing data so that it is uniform across all health reporting systems. Allows for easier data transfer among different systems.

**Home page**
The first screen in CAIR that displays for users who have access to a single organization. This page contains announcements, release notes, resources, and the menu.

**Hyperlink**
A word or group of words that is underlined and appears in a colored font, usually blue, in CAIR. When you click on the underlined text, the Web site, page, or document that is described will be displayed. Also known as a link.

**Immunization Information System**
Confidential, computerized information system containing patient demographics and immunization histories. Immunization Information Systems enable public and private health care providers to maintain consolidated immunization records.

**Inventory Doses**
Doses that are recorded in CAIR through the user interface which subtract from an inventory lot whose quantity is recorded and maintained in CAIR. (See also Historical Doses and Other Owned Doses.)

**Logout**
Button on CAIR’ menu bar that allows you to exit CAIR. You may logout from any screen in CAIR.

**Lot number**
The unique, identifying number given to each vaccine by the manufacturer.

**Manage Access/Account Screen**
The first screen in CAIR, which displays for users who have access to multiple organizations. The user chooses one of the organizations to access.

**Menu bar**
The CAIR menu bar is dark blue and appears at the top of every screen within the registry. The menu bar has several menu options: home, change password, logout, and help (light bulb). The menu bar on your Internet browser, on the other hand, is located near the top of your computer screen and contains words with drop-down lists such as File, Edit, View, Tools, etc.

**Menu panel**
The CAIR menu panel is a medium blue color and appears to the left of every screen within the registry. The menu panel lists all of the NYSIIS functions available to the user.

**Ordering authority**
A person with the capability of ordering an immunization for a patient; a person with ordering authority is generally the patient's pediatrician or primary care provider or, within public health organizations, the medical director.

**Other Owned Doses**
Doses that the organization knows it has administered, but not from any vaccine lots maintained in the CAIR inventory module. (See also Historical Doses and Inventory Doses.)

**Patient**
Anyone who has an immunization recorded in CAIR by a provider organization.

**Patient Note**
Some general, non-medical information regarding the patient that is displayed to any user viewing the patient’s record.
**PDF**
Portable document file. A file format that allows you to view and print a document online in its original format with Adobe Reader.

**Radio button**
An input circle that, when clicked, fills with a black dot to indicate a selection.

**Recall Notice**
A card or letter that informs a responsible person or patient of immunizations that are overdue.

**Reconstitution**
The process of mixing a dry, powder form of a vaccine with a diluent to produce doses that may be administered to the patient. This term applies to Smallpox vaccine.

**Release**
A new version of an application, which usually includes enhancements and software fixes. Each release of an application is indicated with a number; for example, CAIR release version 2.0.

**Reminder Notice**
A card or letter that informs a responsible person or patient of immunizations that are due in the future.

**Responsible person**
A parent, relative, or guardian who is associated with the patient and may act as a contact. A patient may also act as the responsible person for himself or herself.

**Series**
The compilation of doses for one vaccine that provides immunity for a certain disease or diseases. For example, the recommended series for the DTP/aP vaccine contains five doses.

**Shortcut**
An icon located on your computer's desktop which, when double-clicked, will open the program displayed by the icon.

**Toolbar**
Located near the top of your computer screen, the toolbar on your Internet browser contains several buttons, such as Back Forward, Stop, Refresh, and Home.

**Tracking schedule**
A schedule of recommended vaccines, their dosage and periodicity information. The tracking schedule is used to validate a patient’s immunization history and makes recommendations for future vaccinations based on that history.

**Undeliverable Address**
An indicator that the address currently on file for the patient is incorrect.

**User roles**
CAIR users are categorized into hierarchical roles that determine their level of access to the functions of CAIR.

**Users**
Individuals who access CAIR in some way, whether it be for printing reports, entering immunization information, tracking inventory, or entering organization-specific maintenance information.