

# CAIR2 Account Update Instructions

CAIR2 Account Update can be accessed at <http://accountupdate.cairweb.org/>

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

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

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

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

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

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

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

## Update Org/Site Info

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

**Welcome to the CAIR Account Update Page!**

The CAIR Account Update page allows authorized Org/Site representatives to:

1. Update information about their CAIR Account(s)
2. Add new Users, delete Users, or modify User access for their CAIR Account(s).

Begin by logging in using your CAIR Organization Code and Zip code. If you are unable to login, check your spelling or enter a previous Zip code if your Zip code has changed since you enrolled.

- Set aside 10-30 minutes to complete the online update process. If you don't complete the entire process, none of the info you enter will be saved.
- If updating a "Clinical" Org/Site, have your Responsible Clinician's full name and CA Medical License Number available.
- **Once an Update is submitted, you will be unable to submit any additional updates until the pending request is processed by the CAIR team.**
- Processing can take 3 weeks.

**ORG CODE:**

**ENTER YOUR ZIP CODE:**

If you have trouble signing on, contact the CAIR Help Desk at: **1-800-578-7889** or by Email: [CAIRHelpDesk@cdph.ca.gov](mailto:CAIRHelpDesk@cdph.ca.gov)

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

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

**Update CAIR Organization Account - Site Information**

Please update your Organization account information as needed then proceed to the next page. Fields with an \* are required.

Your Name  **Enter your full name. Authorized personnel filling out this form.**

Org ID **07CTEST**

Org Name **CHERYLS TEST**

Address 1  Phone

Address 2

City  Fax

Public Org (eg. Community Clinic)  No ZIP Code

Site Email  Confirm Email

Contact First Name  Contact Phone

Contact Last Name

Data Exchange  Yes

WIC Provider  No VFC Provider  Yes  No

VFC PIN

Organization Type  If your Organization Type is incorrect please email us at [CAIRHelpDesk@cdph.ca.gov](mailto:CAIRHelpDesk@cdph.ca.gov) before moving forward as this will affect the user levels of existing and new users at your site.

Responsible Licensed Clinician:  
First Name as it appears on medical license \*  CA Medical License \*   
Last Name as it appears on medical license \*  License Type \*

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

5. The **Org/Site Update** verification page displays next. If your Org/Site's address cannot be validated, a red message will appear. Click the **Back** button to correct your address if this happens. However, you can move forward without correcting the address by clicking the **Continue** button at the bottom of the page.

**CAIR Organization/Site Update**

Please check the information that you have entered. If incorrect, click the 'Back' button to correct. If correct, click the 'Continue' button.

Org/Site - Name:	CHERYLS TEST	Phone:	(510)321-1231
Address (line 1):	850 MARINA BAY PKWY	Fax:	()-
Address (line 2):		ZIP Code:	94804
City:	RICHMOND	Contact Phone:	(510)555-5555
Public Org:	No		
Contact Name:	DANIELLE HODGE		
Contact Email:	CHERYL.SCOTT@CDPH.CA.GOV		
VFC PIN:	888888		
<b>Responsible Clinician's Full Name:</b>	TEST TEST	<b>Medical License:</b>	654321 MD
Organization/Site Type:	School Clinic		

6. If you have no user edits to make, click the **DO NOT** link on each subsequent page until you get to the **Org Agreement** page (at right).

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

### CAIR Organization Update & User Access Agreement

**CAIR Providers/Organization Terms & Conditions**

The California Immunization Registry (CAIR) is a secure, computerized online information system developed to assist medical providers and other approved agencies to track and review immunization information and TB test results for individuals, assess immunization needs and remind/recall patients, avoid unnecessary or redundant immunizations, and control disease outbreaks. Information in CAIR is only available to authorized users. Based on the access level approved, this Agreement will allow the Organization to access, view, add, or modify immunization information/TB test results in CAIR either via the web interface or through electronic data exchange under the conditions listed below. As conditions for participating in CAIR, the above Organization agrees to:

- Comply with California Health and Safety Code Section 120440 regarding immunization registry use, as well as State and Federal laws and HIPAA regulations regarding maintaining the confidentiality of patient information.
- Ensure your Organization staff receive appropriate CAIR training prior to accessing information in CAIR.
- Access information in CAIR only as needed to perform immunization/TB-related activities for individuals presenting to your Provider/Organization for services.
- Safeguard and ensure no sharing of assigned passwords.
- Ensure no misuse or wrongful disclosure of information in CAIR by your Organization staff.
- Disclose to patients or their parents/guardians that state law allows patient immunization information and TB test results to be shared with CAIR and that patients have the option to share their immunization records/TB test results with all CAIR providers or only their primary provider. Written disclosure is highly recommended.
- Report any activity that may compromise the protection and privacy of the information in CAIR.

**CAIR Individual User Terms & Conditions**

California Health and Safety Code Section 120440 limits access to the California Immunization Registry (CAIR) to authorized users who require the information for the purpose of providing immunization services as specified.

As a condition of authorized access to the California Immunization Registry, I agree:

- To only access and use the registry system in the course of my assigned duties for the purpose stated above.
- To keep my user password confidential.
- To only use my own password to access to the registry.
- To maintain the privacy and confidentiality of information in the registry.
- To not communicate, publish and/or otherwise provide or make public any information regarding persons enrolled in the registry and their immunization status, except:
  1. To patients who request their own immunization records,
  2. To individuals authorized by law to access immunization registry information, or
  3. When records are presented in aggregate reports and have no associated identifying information.

To assure appropriate usage of CAIR, a permanent electronic record will be created that will log each User's access into any registry client record. Any unauthorized release of confidential information by a User may revoke my or my Organization's access to the California Immunization Registry (CAIR). User accounts will be inactivated by CAIR staff if a User fails to login to CAIR for a period of 3 months.

**Organization Representative**

By checking this box and entering your name below, you as the Organization Representative agrees that the Organization and all listed Users associated with the Organization have read and will abide by the CAIR rules set forth in this Agreement. If the Organization/Site closes or is bought by another Organization, the Organization/Site must inform CAIR staff within 14 days so that the existing Organization/Site and user accounts can be terminated or reassigned. CAIR reserves the right to terminate this Agreement if the Organization or its Users violate this Agreement or use the system in an unauthorized manner. This Agreement will remain in effect until terminated by either party.

Full Name \*:

Title \*:

Email Address \*:

Contact Number \*:

To leave a message or special instructions for your Local CAIR Representative enter below.

(Maximum characters: 500). You have  characters left.

8. The Organization Representative as listed on the **Org Agreement** will get a confirmation email that the update has been successfully submitted.

**Information has been successfully submitted.  
You will receive a confirmation email shortly.**

## Update Existing User Roles or Inactivate Users

9. Follow Steps 1-5 above.
10. The **Update Existing CAIR User Account** page opens, showing the first 30 existing users. To see other users, click the **Continue** button at the bottom of the page.

11. Changes to existing user roles, email addresses, or user inactivation are the

only changes that can be requested on this page. Make any changes, and click the **Continue** button at the bottom of the page to proceed.

12. If you plan to make other changes, click the **DO NOT** link on the following pages to move you forward to your next desired update page. If these are the only changes you wish to make, keep clicking the **DO NOT** link on each following page until you get to the **Org Agreement** page.
13. Complete the required fields on this page, then click the **Submit My Organization and User Account Information** button at the bottom of the page to complete your update.

### Update Existing CAIR User Account Information

Existing (Active) User Accounts for this Org Code are listed below. Review and update the information for each user. Fields with an \* are required. Before changing an existing user's role, first review the [CAIR User Roles](#) for what each user role is allowed to do.

When all User Accounts have been updated, click the 'Continue' button. You will be able to view and update Shotgivers once you have confirmed your user(s). If you only need to add Shotgivers, you can skip updating your users and proceed to updating your Shotgivers by clicking [I only want to update my Clinicians](#).

\*PLEASE NOTE: Site contacts and responsible clinicians who need user accounts and are not already listed as existing active users should be added to the 'Add New CAIR User Account' page of this form.

If you would like to skip this update portion because you do not need to update your existing active users please click the link below.

**[I DO NOT](#) need to update my existing active users.**

Existing Users: 31 - 37 of 37

Username:	RBARRON	User Description:	RICHARD BARRON
First Name*	<input type="text" value="RICHARD"/>	Last Name*	<input type="text" value="BARRON"/>
Email*	<input type="text" value="CHERYL.SCOTT@CDPH.CA.GOV"/>		
User Role*	<input type="text" value="Read-Only"/>		
<input type="checkbox"/> Inactivate User			

## Re-Activate Users

14. Follow Steps 1-5 above.

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

**Re-Activate User: 07CTEST**

To re-activate an existing inactive user within your Organization, enter the inactive user's First and Last Names in the fields below and click the 'Search' button. When their name appears, complete the required information. Make sure to check the 'Reactivate this User' box before clicking the 'Submit' button. Repeat this process for each inactive user you wish to re-activate. If you do not need to update your existing inactive users please click the link below.

**I DO NOT need to re-activate any existing inactive users.**

First Name:	Last Name:
<input type="text"/>	<input type="text"/>
<input type="button" value="Search"/>	

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

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

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

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

## Transfer Users or Expand Their Access to Other CAIR Accounts

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

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

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

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

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

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

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

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

### CAIR User Transfer/Additional Access

Use this form to:  
1). Transfer an existing user from one site to another site (i.e., move account).  
2). Add an existing user to a site in addition to their current site (i.e., add to an additional site).

To transfer additional users click the "Add Additional User" button. You are able to add and transfer up to 5 users at a time. When you have completed entering their information, click the "Continue" button. All fields are required.

If the user does not already have an account at another organization, or if you do not know what their previous account information is, please click the link below. If you do not need to grant any users access to your site from another organization please click the link below.

**I DO NOT need to transfer any users.**

#### Transfer Users

Previous/Current Login Org Code	<input type="text"/>	Transfer/Add Access to Org Code	<input type="text" value="07CTEST"/>
Username	<input type="text"/>	Last Name	<input type="text"/>
First Name	<input type="text"/>	Re-type Email	<input type="text"/>
Email	<input type="text"/>		
Inactivate From Login Org Code	<input type="text" value="Choose One"/>		

## Add New Users

26. Follow Steps 1-5 above.

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

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

**New CAIR User Account**

This page is for adding new users that do not have an existing user account.

When requesting a new user, first review the [CAIR User Roles](#) for what each user role is able to do in CAIR2. Complete the information below for each New User you wish to create an account for. To add additional users click the 'Add Additional User' button. You are able to add up to 10 users at a time. When you have completed entering New User information, click the 'Continue' button. Fields followed by \* are required.

**\*PLEASE NOTE: Adding a new user does not list them as a shotgiver in the 'administered by' dropdown in CAIR2. If the new user also administers vaccines (as a shotgiver) and you want their name to appear in the 'admin by' dropdown in CAIR2, they must also be added as a New Shotgiver. You can add new Shotgivers on the upcoming 'Add New Shotgiver' page. If you do not need to add any new user accounts for your site please click the link below.**

**I [DO NOT](#) need to add new user accounts.**

**New Users**

First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Email*	<input type="text"/>	Re-type Email*	<input type="text"/>
User Role Requested*	<input type="button" value="Choose One"/>		

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

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

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

## Update Existing ShotGivers

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

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

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

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

### Update Existing CAIR2 ShotGiver Information

Existing Shotgivers associated with this Organization are listed below. Please carefully review and update the information for each Shotgiver. Fields with an \* are required.

When information for each of your Shotgivers has been updated, click the 'Continue' button. If you do not need to update information for existing Shotgivers please click the link below.

**I [DO NOT](#) need to update any existing shotgivers.**

Existing Clinician(s): 1 - 9 of 9

Clinician: <b>PAM CUNNINGHAM, MA</b>	
Title* <input type="text" value="MA"/>	Name: PAM CUNNINGHAM

Clinician: <b>TOM BATES, DO</b>	
Title* <input type="text" value="DO"/>	Name: TOM BATES

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

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

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



## Add New ShotGivers

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

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

38. Follow Steps 1-5 above.

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

**Add New Shotgiver**

Shotgivers are staff members who give shots, or administer vaccines to patients. Their name will appear in the 'Admin by' dropdown in CAIR2 for this site.

**\*PLEASE NOTE** that this will not give them access to CAIR and allow them to log in as a user. If you need them to be added as a user, please go back and add them on the 'Add New CAIR User Account' page of this form.

If you do not need to add any new Shotgivers please click the link below.

**I DO NOT** need to add new Shotgivers.

**New Clinicians(ShotGivers)**

Title\*  First Name\*  Last Name\*

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

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

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