

Guide to Using the Manage Patient Status Feature in CAIR2

(Updated: 7/27/2020)

For additional support, the following resources are available:

Your Local CAIR Representative (LCR): <http://cairweb.org/lcrs/>

CAIR Help Desk: 800-578-7889, CAIRHelpDesk@cdph.ca.gov

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1. Introduction to the Manage Patient Status Feature

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

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

Use of Manage Patient Status to inactivate patients who are no longer active in your practice removes them from your CAIR2 immunization coverage reports and reminder/recall reports, making these reports more accurate (and therefore more useful). Please note that use of Manage Patient Status to set a patient to 'inactive' in your practice removes them from these reports but not from CAIR2.

2. Recommendations for Inactivating Patients

Your site should establish internal policies for determining when to inactivate a patient from your site in CAIR2 and when to leave a patient as Active.

Your site may want to consider having different criteria for different age groups. For example, adolescents and adults may not be due for shots for longer periods of time (e.g., annually) as opposed to young children who may be due every few months. In these cases, you may want to keep adolescents/adults active in CAIR2 for your site for longer periods of time even if they have not received a vaccination recently.

In addition, your site should also establish an internal policy on when to use a specific status - for example, when to designate a patient as 'Inactive-No Longer a Patient' versus 'Inactive-Lost to follow-up.

The five Patient Status categories available in CAIR2 are:

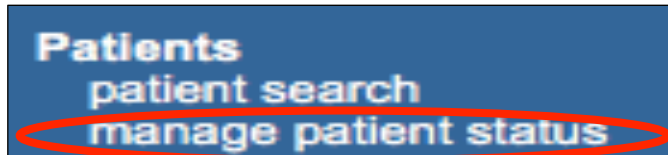
- Active
- Inactive-No longer a patient
- Inactive-Lost to follow up
- Inactive-Unspecified
- Deceased (can only be selected within an individual patient record)

IMPORTANT NOTE: We encourage you to review each patient in the list that is generated before inactivating the entire group, in case some patients should still be considered active even though they may have not been into your practice for a vaccination recently.

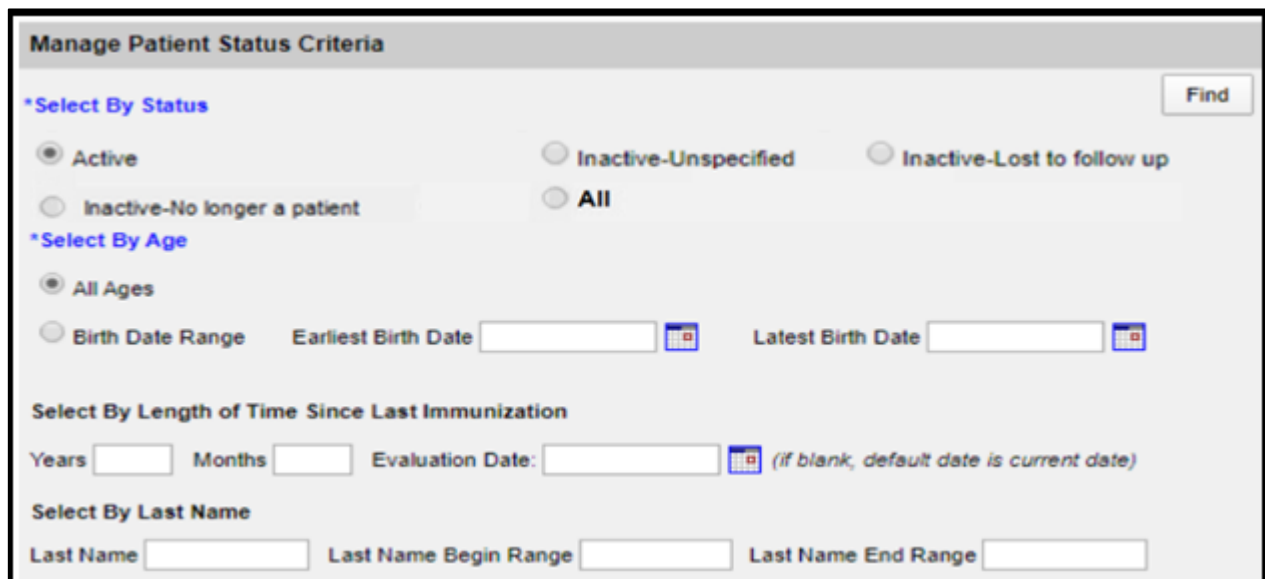
3. Accessing the Manage Patient Feature

To access the Manage Patient feature:

1. Log into CAIR2.
2. Click the 'manage patient status' link on the left blue menu.



The Manage Patient Status Criteria screen will display:



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

- Select By Status (required): Generating a group based on patients' current Active/Inactive status in CAIR2 (see Section 4).
- Select By Age (required): Generating a group based on age (or Birth Date range) of patients (see Section 5).
- Select By Length of Time Since Last Immunization: Generating a group by the last time your site gave an immunization to the patients (see Section 6).
- Select By Last Name: Generating a group based on patients' Last Name (see Section 7).

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

4. Generating a Group of Patients by Status

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

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

Manage Patient Status Criteria

***Select By Status**

Active Inactive-Unspecified Inactive-Lost to follow-up
 Inactive-No longer a patient All

***Select By Age**

All Ages
 Birth Date Range Earliest Birth Date Latest Birth Date

Select By Length of Time Since Last Immunization

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

Select By Last Name

Last Name Last Name Begin Range Last Name End Range

You will then see a group of all patients that currently have the status you selected (see below) listed alphabetically by last name. For example, if you selected 'Active', the list will contain all patients in CAIR2 that currently have an Active status with your site.

| Patient Status Result Set Returned 1-26 of 26 | | | | | | |
|---|---|-----------|------------|------------|---------|----------------|
| Page | Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
| | <input checked="" type="checkbox"/> All | | | | | |
| | <input type="checkbox"/> | AARONS | MICHAEL | 01/02/2000 | 146969 | ACTIVE |
| | <input type="checkbox"/> | ALMOND | JOY | 06/01/2000 | 145637 | ACTIVE |
| | <input type="checkbox"/> | AZAIR | HELEN | 06/01/2015 | 146970 | ACTIVE |
| | <input type="checkbox"/> | BOOP | BETTY | 05/08/2008 | 145423 | ACTIVE |
| | <input type="checkbox"/> | BLIG | ILINE | 02/05/2009 | 145403 | ACTIVE |

The screen contains:

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

See Section 8 of this Guide for instructions on how to change the status of patients on this screen.

5. Generating a Group of Patients by Birth Date Range

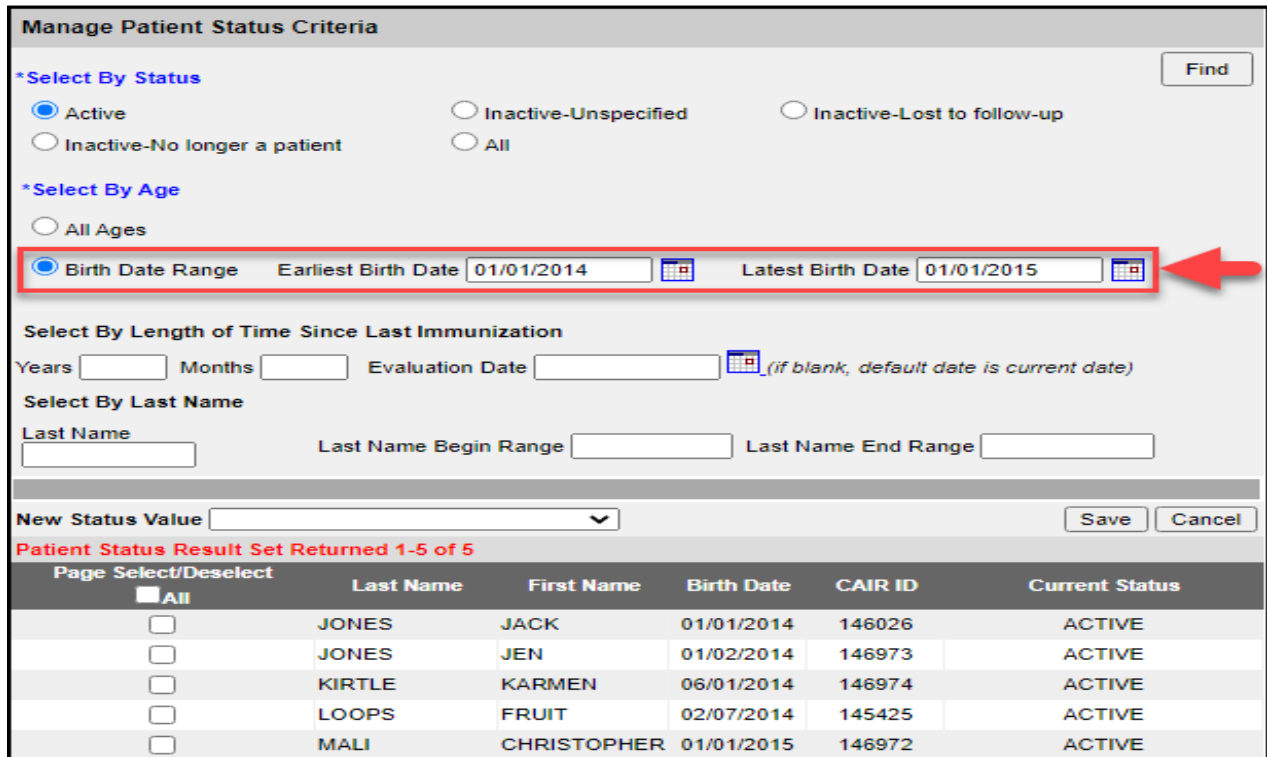
Using a Birth Date Range is a helpful way to narrow the number of patients that display, especially if you want to focus on a specific age group (e.g., young children).

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

1. Choose a status in the 'Select By Status' section.
2. Select the Birth Date Range button in the 'Select By Age' section.
3. Enter a Birth Date range in MM/DD/YYYY format, or select a date using the calendar.
 - Both Earliest and Latest date fields are required.
4. Leave all other fields blank.
5. Click the 'Find' button at the top right of the screen.

On the screen that displays (below), you will see a group of all patients that currently have the status you selected that are within that Birth Date range.

Example below: Based on the criteria entered, the group that displays includes all patients that are currently listed as Active for the site and born within the Birth Date Range of 1/1/2014-1/1/2015.



Manage Patient Status Criteria

*Select By Status Find

Active Inactive-Unspecified Inactive-Lost to follow-up
 Inactive-No longer a patient All

*Select By Age

All Ages

Birth Date Range Earliest Birth Date 01/01/2014 Latest Birth Date 01/01/2015

Select By Length of Time Since Last Immunization
Years Months Evaluation Date (if blank, default date is current date)

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

New Status Value Save Cancel

Patient Status Result Set Returned 1-5 of 5

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|------------------------------|-----------|-------------|------------|---------|----------------|
| <input type="checkbox"/> All | JONES | JACK | 01/01/2014 | 146026 | ACTIVE |
| <input type="checkbox"/> | JONES | JEN | 01/02/2014 | 146973 | ACTIVE |
| <input type="checkbox"/> | KIRTLE | KARMEN | 06/01/2014 | 146974 | ACTIVE |
| <input type="checkbox"/> | LOOPS | FRUIT | 02/07/2014 | 145425 | ACTIVE |
| <input type="checkbox"/> | MALI | CHRISTOPHER | 01/01/2015 | 146972 | ACTIVE |

See Section 8 of this Guide for instructions on how to change the status of patients using this screen.

6. Generating a Group of Patients by ‘Length of Time Since Last Immunization’

Using the ‘Select by Length of Time Since Last Immunization’ field is a helpful way to narrow the number of patients that display, especially if you want to focus on patients that have not received an immunization from your site in a long time (e.g., in the past 2 years).

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

1. Choose a status in the ‘Select By Status’ section.
2. Choose an Age option in the ‘Select By Age’ section.
 - If you want to focus on a specific age group (e.g., young children) enter a Birth Date Range (See Section 5 above).
3. Enter the ‘Years’ and/or ‘Months’ fields: Enter the amount of time you want to set for the last time the patient received an immunization from your site.
 - ‘Years’ and ‘Months’ can be used in combination with each other or used separately.
4. Enter an Evaluation Date. The ‘Evaluation Date’ is calculated from the number of years and/or months entered.
 - If you leave this field blank it will default to today’s date.
5. Click the ‘Find’ button at the top right of the screen.

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

Manage Patient Status Criteria

***Select By Status**

Active Inactive-Unspecified Inactive-Lost to follow-up
 Inactive-No longer a patient All

***Select By Age**

All Ages
 Birth Date Range Earliest Birth Date Latest Birth Date

Select By Length of Time Since Last Immunization

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

Find

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

See Section 8 of this Guide for instructions on how to change the status of patients that are listed in the group of patients that displays.

7. Generating a Group of Patients by Last Name

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

There are several ways to search for patients by Last Name:

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

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

1. Choose a status in the 'Select By Status' section.
2. Leave the 'Select By Age' option defaulted to 'All Ages', unless you want to narrow the list even further (see Section 5 above).
3. (Optional) Enter criteria for 'Select By Length of Time Since Last Immunization' if you want to narrow the list even further (see section 6 above). Otherwise leave it blank.
4. Enter a Last Name or last name range in the 'Select By Last Name' section.
5. Click the 'Find' button at the top right of the screen.

Example 1: Based on the criteria entered below, the group that will display will include patients that are currently listed as Active for the site, of all ages, who have the last name 'Jones'.

Manage Patient Status Criteria

*Select By Status
 Active Inactive-Unspecified Inactive-Lost to follow-up
 Inactive-No longer a patient All

*Select By Age
 All Ages
 Birth Date Range Earliest Birth Date [] [] Latest Birth Date [] []

Select By Length of Time Since Last Immunization
 Years [] Months [] Evaluation Date [] [] (if blank, default date is current date)

Select By Last Name
 Last Name [JONES] Last Name Begin Range [] [] Last Name End Range [] []

New Status Value [] [v] [Save] [Cancel]

Patient Status Result Set Returned 1-1 of 1

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|------------------------------|-----------|------------|------------|---------|----------------|
| <input type="checkbox"/> All | JONES | JACK | 01/01/2014 | 146026 | ACTIVE |

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

Select By Last Name

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

New Status Value [] [v] [Save] [Cancel]

Patient Status Result Set Returned 1-3 of 3

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|------------------------------|-----------|------------|------------|---------|----------------|
| <input type="checkbox"/> All | JOLLY | JAMES | 01/01/2016 | 146967 | ACTIVE |
| <input type="checkbox"/> | JONES | JACK | 01/01/2014 | 146026 | ACTIVE |
| <input type="checkbox"/> | JONES | JEN | 01/02/2014 | 146973 | ACTIVE |

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

Select By Last Name

Last Name

Last Name Begin Range Last Name End Range

New Status Value Save Cancel

Patient Status Result Set Returned 1-3 of 3

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|------------------------------|-----------|------------|------------|---------|----------------|
| <input type="checkbox"/> All | | | | | |
| <input type="checkbox"/> | AARONS | MICHAEL | 01/02/2000 | 146969 | ACTIVE |
| <input type="checkbox"/> | ALMOND | JOY | 06/01/2000 | 145637 | ACTIVE |
| <input type="checkbox"/> | AZAIR | HELEN | 06/01/2015 | 146970 | ACTIVE |

8. Changing the Status of One or Multiple Patients

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

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

New Status Value Save Cancel

Patient Status Result Set Returned 1-26 of 26

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|------------------------------|-----------|------------|------------|---------|----------------|
| <input type="checkbox"/> All | | | | | |
| <input type="checkbox"/> | AARONS | MICHAEL | 01/02/2000 | 146969 | ACTIVE |
| <input type="checkbox"/> | ALMOND | JOY | 06/01/2000 | 145637 | ACTIVE |
| <input type="checkbox"/> | AZAIR | HELEN | 06/01/2015 | 146970 | ACTIVE |
| <input type="checkbox"/> | BOOP | BETTY | 05/08/2008 | 145423 | ACTIVE |
| <input type="checkbox"/> | BUG | JUNE | 02/05/2009 | 145403 | ACTIVE |
| <input type="checkbox"/> | CHOCO | CHIP | 12/16/2016 | 145406 | ACTIVE |

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

 Patient Status Result Set Returned 101-200 of 839 [«Previous](#) [Next»](#)

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|------------------------------|-----------|------------|------------|---------|----------------|
| <input type="checkbox"/> All | | | | | |
| <input type="checkbox"/> | BUTLER | GRACE | 07/16/2005 | 135229 | ACTIVE |
| <input type="checkbox"/> | BUTLER | LILLIAN | 02/01/2008 | 134836 | ACTIVE |
| <input type="checkbox"/> | BUTLER | LISA | 03/05/1999 | 135201 | ACTIVE |
| <input type="checkbox"/> | CAMERON | ALEXANDRA | 07/01/2011 | 135355 | ACTIVE |
| <input type="checkbox"/> | CAMERON | AMANDA | 04/04/2011 | 135400 | ACTIVE |

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

1. Choose the 'New Status Value' you want to change these patients to by using the 'New Status Value' drop down menu.

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|--------------------------|-----------|------------|------------|---------|----------------|
| <input type="checkbox"/> | AARONS | MICHAEL | 01/02/2000 | 146969 | ACTIVE |
| <input type="checkbox"/> | ALMOND | JOY | 06/01/2000 | 145637 | ACTIVE |
| <input type="checkbox"/> | AZAIR | HELEN | 06/01/2015 | 146970 | ACTIVE |
| <input type="checkbox"/> | BOOP | BETTY | 05/08/2008 | 145423 | ACTIVE |
| <input type="checkbox"/> | BUG | JUNE | 02/05/2009 | 145403 | ACTIVE |

2. Select which patients you want to change to the new status:

You have two options:

- a.) If you want to change the status of **ALL** of the patients on the current page you are viewing to the new status, **check** the box for 'Select All/Deselect All'.

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|-------------------------------------|-----------|------------|------------|---------|----------------|
| <input checked="" type="checkbox"/> | AARONS | MICHAEL | 01/02/2000 | 146969 | ACTIVE |
| <input checked="" type="checkbox"/> | ALMOND | JOY | 06/01/2000 | 145637 | ACTIVE |
| <input checked="" type="checkbox"/> | AZAIR | HELEN | 06/01/2015 | 146970 | ACTIVE |
| <input checked="" type="checkbox"/> | BOOP | BETTY | 05/08/2008 | 145423 | ACTIVE |
| <input checked="" type="checkbox"/> | BUG | JUNE | 02/05/2009 | 145403 | ACTIVE |

- b.) If you only want to change the status of **specific** patients on the current page you are viewing to the new status, put a checkmark only by their name.

| Page Select/Deselect | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|-------------------------------------|-----------|------------|------------|---------|----------------|
| <input checked="" type="checkbox"/> | AARONS | MICHAEL | 01/02/2000 | 146969 | ACTIVE |
| <input type="checkbox"/> | ALMOND | JOY | 06/01/2000 | 145637 | ACTIVE |
| <input checked="" type="checkbox"/> | AZAIR | HELEN | 06/01/2015 | 146970 | ACTIVE |
| <input type="checkbox"/> | BOOP | BETTY | 05/08/2008 | 145423 | ACTIVE |
| <input type="checkbox"/> | BUG | JUNE | 02/05/2009 | 145403 | ACTIVE |

3. When you are done, click the 'Save' button.

Example: The list below generated 26 currently Active patients; two patients were selected to change the status to 'Inactive-No longer a patient'.

| Page Select/Deselect | | Last Name | First Name | Birth Date | CAIR ID | Current Status |
|------------------------------|-------------------------------------|-----------|------------|------------|---------|----------------|
| <input type="checkbox"/> All | <input checked="" type="checkbox"/> | AARONS | MICHAEL | 01/02/2000 | 146969 | ACTIVE |
| | <input type="checkbox"/> | ALMOND | JOY | 06/01/2000 | 145637 | ACTIVE |
| | <input checked="" type="checkbox"/> | AZAIR | HELEN | 06/01/2015 | 146970 | ACTIVE |
| | <input type="checkbox"/> | BOOP | BETTY | 05/08/2008 | 145423 | ACTIVE |
| | <input type="checkbox"/> | BUG | JUNE | 02/05/2009 | 145403 | ACTIVE |

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



Once you click 'OK', these patients will now be listed as 'Inactive-No longer a patient' for your site.

REMINDER: If you have more than 100 patients in your list, click the 'Next' link to see the next batch of patients in your group. Repeat the process above until you have completed the group.

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

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

As a reminder, you can also change the status of an individual patient without using the Manage Patient Status feature. You do this by searching for the individual patient in CAIR2 and changing their status within their record. The steps are:

1. Log into CAIR2 and search for the patient.
2. Open the Patient Record.
3. On the Update Patient screen that displays, click on the "Organization Information" tab (see screenshot below).
4. Update the patient's status in the Status field.
5. Click the "Save" button on the upper right hand corner.

Update Patient

Personal Information

* Last Name: MILLER
 * First Name: MARI
 Middle Name:
 Suffix:
 * Birth Date: 08/16/2010
 Mother's Maiden Last: MILLER
 Mother's First Name: JILL

* Gender: Female
 Medi-Cal ID:
 Birth Order: (for multiple births)
 Birth Country: UNITED STATES
 Birth State:
 Birth County: Sacramento
 Medical Record Number:

Last Updated by CAIR CLinic 9 on 06/17/2020

Patient AKA (0) ▼

Organization Information

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Status: ACTIVE
 Provider- PCP:
 * Tracking Schedule: ACIP

Allow Reminder and Recall Contact? Yes
 Last Notice:

Medical Record Numbers

| Remove MRN | Medical Record Number | Primary |
|---|-----------------------|---------|
| No Medical Record Numbers have been added for this patient. | | |