CAIR2 Account Update Instructions

Important Information:

- Only authorized staff (i.e., supervisors and/or administrators) at the organization site should be logging in and submitting Account Updates, **NOT** individual users. Sites should identify one or two staff members to be responsible for submitting updates.
- Submitting an Account Update and/or enrolling your site in CAIR2 does not grant you access to log into CAIR2. You will need to request a new CAIR2 user account for yourself and/or staff by following the steps in New CAIR User Account. If you or any of your staff have previously had a CAIR2 user account in another site, then follow the steps in CAIR User Transfer/Additional Access.

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 ‘Quality Assurance (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 run various aggregate patient reports, including reminder/recall. The 'QA' user role requires no formal training, and your staff will get 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.

For additional support, contact the CAIR2 Help Desk:
Phone: 800-578-7889
Fax: 888-436-8320
Email: CAIRHelpDesk@cdph.ca.gov

The CAIR2 Account Update page allows you to modify your organization/site and user info in the following order (unless otherwise specified):

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Revised: 4/19/22
Update CAIR Organization Account- Site Information

1. If you are an authorized staff, go to http://accountupdate.cairweb.org/. To log in, enter your organization’s ‘Org Code’ and ‘Zip Code’ and click on the Sign On button.

![Welcome to the CAIR2 Account Update Page!]

- Update information about their CAIR2 Org/Site account
- Add new Org/Site Users, update existing Org/Site User Info, or modify existing Org/Site User roles.

Please note that each update may take up to 5 working days to process and during this period, your Org/Site will be prevented from submitting additional Updates.

Prior to submitting an update, please be sure to:
- Set aside sufficient time (15-30 min) to complete the update without interruption as page changes will not be saved until the update is submitted.
- When adding clinical staff who prescribe vaccines (staff with ‘Ordering Authority’), be prepared to enter their full names, their National Provider Identifier (NPI), and their CA Medical License numbers.

Note: If your Org/Site is sending data to CAIR2 electronically (from an EHR system), the most useful user role for your practice is the ‘DX QA’ user role which allows a staff member to login to CAIR2 and monitor data exchange transactions as well as to run various aggregate patients reports for your practice. Another significant advantage of this user role compared to others is that no formal training is required (see CAIR2 User Roles) so that ‘DX QA’ users get access to CAIR2 as soon as their account is approved by CAIR2 staff.

![Instructions]

If you have trouble signing on, contact the CAIR Help Desk at: 1-800-578-7889 or by Email: CAIRHelpDesk@cdoh.ca.gov

**NOTE:** If you or another authorized staff have recently submitted an Account Update request, the following screen will display when logging into the Account Update page. You will need to wait for the request to be processed before submitting another Account Update.

![Update CAIR Organization Account - Site Information]

This site (Org Code: 07CTEST) has pending update that was submitted on 04-12-2022 by PETER SEARLE. Once it has been processed you will be able to update your organization and users.

2. The ‘Update CAIR Organization Account - Site Information’ screen will display when logged in.
3. At minimum, add your full name and confirm the contact’s email address and their phone number. Make additional edits as needed for any of the fields:
   - **Address**: Update if your site moved location, incorrect address listed, or the fields are blank.
   - **Phone/Fax**: Update if your site has a new phone/fax number, incorrect number(s) listed, or the field(s) are blank.
   - **Contact’s information**: Update if the contact listed no longer works at the site and you are the new contact.
   - **VFC Provider/PIN (If applicable)**: If your site is enrolled in the Vaccines for Children (VFC) program, the ‘VFC Provider’ field should be marked ‘Yes’ along with your site’s ‘VFC PIN’. If any of the information is incorrect or missing, you can update the fields.
   - **Responsible Licensed Clinician (If applicable)**: If your site is a clinical provider (i.e., provides routine vaccines), these fields will need to be completed with the clinician’s full ‘First Name’, ‘Last Name’, ‘CA Medical License’ number, and ‘License Type’.

4. Then click the **Continue** button to proceed to the next screen.

5. The ‘CAIR Organization/Site Update’ verification screen displays next.

![CAIR Organization/Site Update](image)

6. If your org/site’s address cannot be validated, a red message will appear that states ‘The address you have entered cannot be validated by the United States Postal Service’. If the address is incorrect, click the **Back** button to correct the address. However, if the address is correct, click on the **Continue** button to proceed to the next screen.

**Update Existing CAIR Users**

**IMPORTANT NOTE**: If your site has recently enrolled in CAIR2, this screen will not display as user accounts have not yet been requested. The ‘CAIR User Transfer/Additional Access’ screen will display first. Proceed to **pg. 5** for further instructions.

You can make updates to existing (active) users at your site such as their ‘First Name’, ‘Last Name’, ‘Email’ address, and ‘User Role’. See the [CAIR2 User Roles](#) document for what each user role can do. However, there is no field to update an existing user’s username. If an existing user has had a name change (e.g., recently married) or the information is incorrect (e.g., misspelled last name) and need to update their username, you can request that the user’s username is updated by adding a note in the ‘Message/Special Instruction’ text box before submitting the Account Update request(s). Further instructions provided in [CAIR Organization Update & User Access Agreement](#). Users can also be inactivated on this screen if needed.

**NOTE: DO NOT** update the fields if the information does not pertain to the user (e.g., updating a former staff member’s information with a new staff member’s information) since the username is unique to each user. You will need to request a new CAIR2 user account for new staff by following the steps in [New CAIR User Account](#) to obtain their own unique username. If the new staff member has previously had a CAIR2 user account in another site, then follow the steps in [CAIR User Transfer/Additional Access](#).
NOTE: If no updates need to be done on this screen, click the click here link to proceed to the next screen.

1. The ‘Update Existing CAIR Users’ screen will display the first 30 existing (active) users. The total number of existing users for the organization will be noted next to ‘Existing Users:’. To see the remaining users, click the Continue button at the bottom of the screen.
2. If you made any changes on this screen and need to proceed to the next screen, click the Continue button at the bottom of the screen.

Re-Activate User

If you need to re-activate an existing user’s account from your org/site because they have been inactivated in the past, you can search for the user on this screen and re-activate their account.

NOTE: If no updates need to be done on this screen, click the click here link to proceed to the next screen.

1. Enter the user’s ‘First Name’ and ‘Last Name’ and click the Search button.
2. If there is no match, the message ‘There are no Users matching your criteria’ will display at the bottom of the screen. However, if there is a match, additional fields will display at the bottom of the screen (see screenshot below). Complete the user’s ‘First Name’, ‘Last Name’, ‘Email’ address, and ‘User Role Requested’. Then select the Re-activate this user checkbox and click on the Submit button.
3. Continue to re-activate additional users if needed. When finished, click the click here link to proceed to the next screen.
CAIR User Transfer/Additional Access

IMPORTANT NOTE: If your site has recently enrolled in CAIR2, this is the first screen you will see after the ‘CAIR Organization/Site Update’ screen.

If you know that a staff member used CAIR2 at another site, use the ‘CAIR User Transfer/Additional Access’ screen for the following tasks:

- Transfer an existing user from another site to your site (e.g., no longer works at the previous site they had CAIR2 access).
- Add an existing user to your site in addition to their current site (e.g., works at multiple sites/locations and needs CAIR2 access for your site).

NOTE: If no updates need to be done on this screen, click the link to proceed to the next screen.

1. Complete all the fields on the screen:
   - Previous/Current Org Code: Enter the org code the user previously or currently has access to.
   - Username: Enter the user’s username from the org code you entered in the ‘Previous/Current Org Code’ field.
   - First and Last Name: Enter the user’s first and last name.
   - Email and Re-type Email: Enter the user’s current email address in both fields.
   - Inactivate From Previous/Current Org Code?: From the dropdown, select ‘No’ if you are just adding the user to your site (will continue to have access at the other site) or select ‘Yes’ if you are transferring the user’s account to your site (no longer works at the previous site).

2. Click the Transfer/Add Access button if additional users need to be transferred/added to your site. Up to 5 users can be included in your request.

3. Click the Continue button when you are finished requesting transfers/additional access to proceed to the next screen.

New CAIR User Account
You can request new CAIR2 user accounts for staff on this screen if they have never had an existing user CAIR2 account in the past. Authorized staff/contacts will also need to request an account on this screen to obtain access to CAIR2 since an account is not automatically provided.
NOTE: If no updates need to be done on this screen, click the **click here** link to proceed to the next screen.

### New CAIR User Account

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

To add a New User to your site:

1. Enter their name and email address below.
2. Before selecting their User Role, review the CAIR User Roles to see which user role is most appropriate for them.
3. To add more New Users, click the 'Add Additional User' button (you can add up to 10 new users at a time).
4. When you are done adding all new users, click the 'Continue' button.

**IMPORTANT NOTE:** If any of these new Users will also be administering vaccines, you must also add them as Shotgivers on the upcoming 'Add New Shotgiver' screen, so that they appear in the 'Administered By' dropdown menu when recording a shot in CAIR.

If you Do NOT need to add any New Users **click here.**

1. Enter/select the user’s ‘First Name’, ‘Last Name’, ‘Email’ address, and ‘User Role Requested’. See the [CAIR2 User Roles](#) document for what each user role can do.
2. If you need to request new CAIR2 user accounts for additional staff, click on the **Add Additional User** button. Up to 10 users can be included in your request.
3. When you have completed adding your new users, click the **Continue** button to proceed to the next screen.
4. The 'New CAIR User Account(s)' screen will display next. Confirm the information you entered in the previous screen is correct before proceeding to the next screen. If the information is incorrect, click the **Back** button to correct the information. If the information is correct, click the **Continue** button to proceed to the next screen.

### Update Existing Shotgivers

**IMPORTANT NOTE:** For sites who have clinical access to CAIR2, this screen will only appear if you have existing shotgivers. If not, you will see the ‘Add New Shotgiver’ screen. Proceed to pg. 7 for further instructions.

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. Existing shotgivers for your site will display on this screen but you can only update the shotgivers’ ‘Title’. There is no field/option to remove a shotgiver or update their first and last name. If you need to have a shotgiver(s) removed or their first and/or last name updated, you can request the update by adding a note in the ‘Message/Special Instruction’ text box before submitting the Account Update request(s). Further instructions provided in [CAIR Organization Update & User Access Agreement](#).
NOTE: If no updates need to be done on this screen, click the **click here** link to proceed to the next screen.

1. Click on the **Title** dropdown and choose the shotgivers’ ‘Title’ from the list.
2. Continue updating shotgivers’ titles if needed.
3. When you have completed updating titles, click the **Continue** button to proceed to the next screen.

### Add New Shotgiver

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.

**IMPORTANT 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 [New CAIR User Account](#) screen. If you are a Data Exchange (DX) site, you **DO NOT** need to request shotgivers because they are included in your DX file when administered shots are recorded in your EHR/EMR system.

**NOTE:** If no updates need to be done on this screen, click the [DO NOT](#) link to proceed to the next screen

1. Enter/select the ‘Title’, ‘First Name’, and ‘Last Name’ of the clinicians from your practice who will be administering vaccines. Adding them as shotgivers will assure that their names appear in the ‘Administered By’ drop-down list in CAIR2. **NOTE:** Shotgivers must also be added as CAIR2 users to login to CAIR2.
2. Click on the **Additional Clinician** button to add additional shotgivers.
3. When you have completed adding your new shotgivers, click the **Continue** button to proceed to the next screen.

### CAIR Organization Update & User Access Agreement

This is the final screen before submitting your Account Update request(s). Read the information before completing the fields and submitting.

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Revised: 4/19/22
1. After reading the agreement. Click on the checkbox and complete the required fields. You can also leave a message or special instructions in the text box provided:
   - An existing user’s username needs to be updated
   - To remove existing shotgiver(s)
   - To update an existing shotgiver’s first and/or last name
   - Any additional update requests you couldn’t update (i.e., there was not a field/screen to update the information)

2. Then click on the Submit my Organization and User Account Information button at the bottom of the screen to submit your Account Update request(s).

3. The message ‘Information has been successfully submitted’ will display and a confirmation email will be sent to the person who completed the agreement.