Vaccine Transfer User Guide
(Revised: 04/01/2022)

This guide describes how to transfer vaccines in CAIR2 from one site to another site for providers who are managing their vaccine inventory in CAIR2.

For additional support, the following resources are available:
Your Local CAIR Representative (LCR): CAIR LCR’s
CAIR Help Desk: 800-578-7889: CAIR Help Desk

Contents
Section I: Initiating a Transfer ........................................................................................................................................2
  a. VFC Providers ......................................................................................................................................................2
  b. Accessing the Vaccine Transfer Feature in CAIR2 ..........................................................................................2
Section II: Viewing Current and Historical Transfers ...............................................................................................2
Section III: Creating a New Transfer................................................................................................................................3
  a. Searching for Receiving Site ...................................................................................................................................4
  b. Transfer Quantity .................................................................................................................................................5
  c. Modifying/Deleting Transfer Quantity ..............................................................................................................6
  d. Preparing for Shipment .......................................................................................................................................7
  e. Shipping Vaccines ..............................................................................................................................................8
Section IV: Accepting and Rejecting Transfers ..........................................................................................................9
  a. View the Transferred Vaccines ............................................................................................................................9
  b. Accepting transfer ..............................................................................................................................................10
  c. Reject Transfer ..................................................................................................................................................11
  d. Partially Accept ...............................................................................................................................................13
Section V: How to Accept a Returned Transfer .....................................................................................................14
Section I: Initiating a Transfer

All sites using CAIR2 to track their vaccine inventory can transfer vaccines to one another. Before initiating a transfer make sure you:

- Have a vaccine delivery contact address listed in your CAIR2 account.
- Turn off your browser’s pop-up blocker.
- Confirm that both the receiving and sending sites are using CAIR2 to track their inventory and have an active Power user. You can contact your Local CAIR Representative to confirm.

a. VFC Providers

VFC providers have the option to transfer vaccines to other VFC providers. It is important to consider:

- All requests to transfer VFC vaccines to another provider must first be approved by the CDPH VFC Program before both transferring the vaccines in CAIR2 and physically transferring the vaccines to another site/provider.
- Transfers can only occur between active VFC providers in good standing, suspended VFC providers will not be allowed to receive vaccines from another VFC provider.
- Vaccine transfer should only occur during limited situations (e.g., during a long-term power outage or vaccine shortage equipment failure). Routine vaccine transferring is not recommended.
- Follow recommendations for proper refrigerated vaccine transport or frozen vaccine transport [https://eziz.org/vaccine-storage/](https://eziz.org/vaccine-storage/).

b. Accessing the Vaccine Transfer Feature in CAIR2

Only Power user(s) at your site have access to the Vaccine Transfer feature in CAIR2. In order to send and receive vaccine transfers, both sites need an active Power user and to be using CAIR2 to track their inventory.

To access the Vaccine Transfer feature:

1. Log into CAIR2: [CAIR2 Login](#)
2. Once logged in, click on the ‘manage transfers’ link.

Section II: Viewing Current and Historical Transfers

This section describes how to view your current and historical vaccine transfers in order to initiate a new transfer to another organization. Prior to initiating a transfer you should:

- Check your current vaccine inventory to make sure you have enough vaccines to transfer.
• Check your vaccine transfer history to see when the last time you transferred vaccines to the receiving site to avoid making duplicate transfers.

To view **current** and **historical** transfers:

1. Click the ‘manage transfers’ link under ‘Inventory’ on the menu panel.

2. The Manage Transfer screen shows:
   - **Outbound Transfer**: Current transfers initiated by your organization.
   - **Inbound Transfer**: Current transfers sent to your organization.
   - **Historic Transfer**: Sent and received transfers that have been completed.

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**Section III: Creating a New Transfer**

This section describes how to transfer vaccines to another site using the CAIR2 Inventory feature.

1. In the Manage Transfer screen, click on the **‘New Transfer’** button to create a new transfer.
2. Search for the organization that will be receiving the vaccines. (See instructions below).

NOTE: ‘Sending Site’ will default to the organization you are logged in as. If you have your username linked to multiple org codes and need to change the ‘Sending Site’ click on Manage access/account tab.

a. Searching for Receiving Site
   1. Narrow the search by selecting a criterion to use in the ‘Search Field’:
      - Name- Receiving site’s name.
      - Org Code- Receiving site’s organization code.
      - VFC Pin- Receiving site’s VFC pin (if applicable).
      - Address- Receiving site’s address.
      - City- City where receiving site is located.
      - Zip Code- Zip code of city where receiving site is located.
      - Phone number- Receiving site’s contact phone number.
      - Contact First Name- First name of the primary contact at the receiving site.
      - Contact Last Name- Last name of the primary contact at the receiving site.
      - County- County where receiving site is located.
2. Enter the first few letters of the organization’s name. A list of sites matching the criteria will appear for you to select from.

NOTE: If a receiving organization is selected and their vaccine delivery information is not complete the following message will display “Transfer cannot be created. Receiving organization must have a vaccine delivery contact address.” Both the receiving and sending organization must have a vaccine delivery contact address. You will need to contact your Local CAIR Representative (LCR) for further assistance.

b. Transfer Quantity
   1. On the ‘Add from Inventory’ section, you can view available vaccine lots by selecting either ‘Active and Non-Expired’ or ‘Inactive or Expired’ radio button.
NOTE: Each column displays the Trade Name, Vaccine Group, Lot Number, Quantity Available, Active, Funding Source, and Expiration Date for the vaccine you have in your inventory.

2. Enter the amount of each vaccine you would like to transfer. You can transfer multiple vaccines at the same time. When all transfer vaccines have been identified click the ‘Save’ button.  
   NOTE: When it comes to single dose vaccines, enter the number of doses you would like to transfer. However, if it is a multidose vial, enter the number of doses in the vial, not the number of vials.

3. Once you save it, the screen will display ‘Saved Successfully.’

c. Modifying/Deleting Transfer Quantity
   1. The transfer item(s) are now listed. If you need to modify the quantity, you can do so by typing in a new value under the ‘Transfer Quantity’ column. You can also add more lots by adding the quantity of doses you want to transfer under the ‘Add from Inventory’ section.
NOTE: Once the transfer item(s) has been successfully shipped, you will **NOT** be able to modify the transaction.

2. You can remove any transfer item by selecting the ‘Remove’ check box next to the item and clicking the ‘Save’ button. The message ‘Saved Successfully’ will appear on the top right-hand corner and you will no longer see the item under the ‘Transfer Item’ section.

d. Preparing for Shipment
1. Once all the modifications have been made, **you must click on either the ‘Packing List’ or ‘Label’ buttons before shipping your transfer.**
   - The ‘Packing List’ specifies the vaccines being sent and should be included in the shipment.
   - The ‘Label’ specifies your (sending site) contact information and may be placed on the outside of the shipment.
NOTE: DO NOT click on ‘Finish Trans’ button because it will automatically add the transfer into the receiving provider inventory. If you accidentally click on this button, please contact your LCR for assistance.

2. Once you print the packing list (required) and label (optional), click on the ‘Ship’ button.

2. As a final review before completing the transaction, the same information on the packing list now displays on the Ship transfer screen. To quit now and not ship, click the ‘Cancel’ button. To complete the transfer, click the ‘Ship’ button.

e. Shipping Vaccines
1. ‘Enter Ship Date’ defaults to today’s date. If different from today’s date, you can change the ship date up to one week in the past or future. Just type the new date using the MM/DD/YYYY format or use the calendar icon.
3. The message ‘Transfer Successfully Shipped’ displays in the upper-right corner of the Manage Transfer screen.

![Manage Transfer Screen with 'Transfer Successfully Shipped' message]

4. The transfer will be moved to the ‘Outbound Transfer’ list where it will remain until it is accepted by the receiving site/organization.

![Outbound Transfer List with 'Transfer Successfully Shipped']

Section IV: Accepting and Rejecting Transfers
This section describes how your organization can accept, reject, or partially accept a transfer received from another site.

To accept, reject, or partially accept an inbound transfer, locate the transfer that was shipped to your organization on the Manage Transfer page in the ‘Inbound Transfer’ section (See Section 2: How to View Current and Historical Vaccines).

a. View the Transferred Vaccines
   1. Under the ‘Create Date’ column, click on the date of the transfer you want to view. This will take you to the Receive Transfer screen where you can ‘Accept Transfer,’ ‘Reject Transfer,’ or ‘Partially Accept’ the transfer.
2. The screen also displays the items that were transferred to you. The system can determine whether it should create a new lot or merge the incoming items with an existing lot. You will be able to see which action will be taken under the 'Inventory Action' column.

**NOTE:** Transfer lot information must be an EXACT MATCH (e.g., Vaccine group, trade name, lot number, and expiration date) to merge with an existing lot.

### b. Accepting transfer

1. To **accept** the transfer, click the 'Accept Transfer' button.

2. The system will ask you “Are you sure you want to add all transfer items into inventory?” Click the ‘OK’ button to accept or the ‘Cancel’ button to return to the Receive Transfer screen.
3. ‘Transfer Successfully Accepted’ message displays in the upper-right corner.

4. The transfer will be added to your inventory by adding the doses to an existing lot or by creating a new lot.

c. Reject Transfer
   1. To reject the transfer, click on the ‘Reject Transfer’ button.  
      NOTE: This will reject the entire transfer.

2. The Reject Transfer screen contains the same information regarding Shipping and Receiving Organizations as the other transfer screens. Select a rejection reason from the drop-down field. Your options are Damaged, Not Wanted, Wrong Vaccine, or Never Received. Click on the ‘Reject’ button.

3. A pop-up message will ask you to contact the sending organization before rejecting and confirm you want to reject the transfer. Click the ‘OK’ button to reject the transfer or click the ‘Cancel’ button to return to the Receive Transfer screen.
4. The message ‘Transfer Successfully Rejected’ displays at the upper-right corner.

5. The transfer will remain in the Inbound Transfer section but now under ‘Type’ it will say ‘REJECTED.’

NOTE: The rejected shipment must be return to the original sender. Until you return the shipment, the original sending Organization will not be able to restock lots into their inventory and transfer will remain in your ‘Inbound Transfer’ section.

6. There will not be a date in the ‘Return Date’ column until you return the vaccines to the original sender. To return shipment to the original sender, click on the date of the transfer located under the ‘Create Date’ column to go to the Ship Return Transfer screen.

7. Enter a ‘Return Ship Date’ and click the ‘Ship’ button to return the transfer to the sending organization.

NOTE: You must also physically pack up and ship the vaccine to the original sender.
8. The message ‘Transfer Successfully Shipped’ displays in the upper-right corner. The sending site will need to accept the returned transfer to restock it in their inventory.

9. Once the sending organization has received and accepted the rejected transfer, the transfer is moved to the ‘Historic Transfer’ section at the bottom of your screen.

   **NOTE:** By default, CAIR will only display past Historic Transfers within the last 7 days. To see Historic Transfers more than 7 days in the past enter a specific date range in the ‘Show by Last Updated Date’ fields.

d. Partially Accept
   
   1. To partially accept the transfer, click on the ‘Partially Accept’ button.

   2. You will need to enter the amount of vaccines accepted for each transfer item and a rejection reason for the vaccine(s) you are not accepting. Your options are Damaged, Not Wanted, Wrong Vaccine, and Never Received. After selecting the amount accepted and rejection reason, click the ‘Save’ button.
3. A pop-up message will ask you to contact the sending organization before rejecting and confirm you want to reject the transfer. Click the ‘OK’ button to partially accept the transfer or click the ‘Cancel’ button to return to the Receive Transfer screen.

4. The message ‘Transfer Partially Accepted’ displays in the upper-right corner.

NOTE: The rejected vaccines must be return to the original sender. Until you return the shipment, the original sending Organization will not be able to restock lots into their inventory and transfer will remain in your ‘Inbound Transfer’ section. Please refer to Reject Transfer (Instructions 6-9) for sending instructions.

Section V: How to Accept a Returned Transfer

1. Once the receiving site has shipped the rejected or partially accepted transfer, the sending site will see the returned transfer in the ‘Outbound Transfer’ section and the return date will show under ‘Return Date’ column. The ‘Type’ column will indicate if the transfer was ‘REJECTED’ or ‘PARTIALLY ACCEPTED.’

2. To view the returned shipment the sending site will have to click on the ‘Create Date’ hyperlink.
3. To accept the returned shipment the sending site will have to click on the ‘Save’ button. 

NOTE: If the receiving site returned the shipment because the vaccine(s) were damaged, it will not be restocked in your CAIR2 inventory.

4. Once the return has been saved the message ‘Transfer Successfully Restocked’ will appear.