NASS 2.0 USER'S GUIDE

This manual contains instructions to access the NASS 2.0 website and enter ART program and cycle-specific data. Sections provide information on getting started in NASS 2.0, entering data, searching data, navigating the system, and using NASS menu links to access reference documents, FAQs, and communications.

Please note: Reporting of initial ART cycle intentions and select patient details in NASS 2.0 is required within four (4) calendar days of the cycle start date. CDC will collect information on prospective reporting by clinics for all cycles started after February 1, 2016. While prospective reporting for cycles started between February 1, 2016 and December 31, 2016 is encouraged, no measure of prospective reporting will be included in the 2016 ART Fertility Clinic Success Rates Report. However, CDC does plan to include a measure of prospective reporting in the future.

For additional information, reference The Centers for Disease Control and Prevention in the Department of Health and Human Services August 26, 2015 Federal Register Notice (80 FR 51811).   The notice describes who shall report, the National ART Surveillance System (NASS) reporting system, the process for reporting by each ART program, the data to be reported, and the contents of the published reports. It supersedes the previous notice published in the Federal Register, September 1, 2000 (65 FR. 53310).

NASS Help Desk Contact Information

Contact the NASS Help Desk with questions about using NASS or reporting your ART data to CDC by calling **1-888-650-0822** (toll free) or sending an e-mail to NASS@Westat.com.

The NASS Help Desk has regular business hours Monday through Friday 9:00am–8:00pm Eastern Time and extended hours during peak times of the year. Please leave a detailed voicemail if you do not reach a staff member and your call will be returned by the next business day.

Contact information and email link to the NASS Help Desk is at the end of every NASS 2.0 web page.

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Section 1: Getting Started in NASS

1.1 System Requirements

NASS is optimized for standard browsers on PC or Mac computers (e.g., Google Chrome, IE 10, Firefox). Please enable JavaScript and cookies (only temporary cookies are used). Also, you will need Adobe Acrobat Reader. After logging in, the NASS menu has a direct link for the free Adobe Reader if you do not have it (many computers already do).

1.2 Setting Up Clinic Accounts

Each ART program is assigned one unique NASS Clinic ID. If you are a new ART program, please contact the NASS Help Desk to get started. Your ART program will be assigned a NASS Clinic ID. If your clinic has a NASS Clinic ID already, this is the one to use for NASS 2.0 reporting. If your clinic has reorganized since it was assigned a NASS Clinic ID, please contact the NASS Help Desk for assistance. Reorganization is defined as a change in ownership or affiliation, or when at least two of the three key staff positions (Practice Director, Medical Director, or Laboratory Director) change because the person holding each of those positions is no longer employed with the practice. In NASS 2.0, your 4-digit NASS Clinic ID is located in the upper right corner of the header on all NASS pages.

Each clinic staff member given access to NASS 2.0 will have a unique NASS 2.0 user account. For new clinics or Medical Directors, please contact the NASS Help Desk and be ready to provide a unique, individual email address (i.e., not a general clinic email), which will be associated with your Medical Director NASS 2.0 user account. Once the Medical Director receives an account set up email, he/she will be able to create user accounts for clinic staff. In addition, the Medical Director can designate up to two additional account administrators (a primary and secondary administrator).

Along with the Medical Director, the alternate primary administrator has the ability to add and delete user accounts, as well as designate account administrators. The secondary administrator has the ability to add and delete user accounts only. Please note that the Medical Director account cannot be deleted by any clinic staff (including the Medical Director). If the Medical Director leaves the practice, or if another physician assumes the role of Medical Director, please contact the NASS Help Desk immediately for assistance.

The Medical Director and each of the account administrators will have a 'User Administration' link available in the NASS menu. Use this link to add and delete users, as well as change account administrator status. To add a user account for a staff member, an individual email address is required. When an account is created, the user will receive a NASS user ID and a temporary NASS password at the email address associated with the new NASS account.

The Medical Director and optional NASS 2.0 account administrator(s) at each clinic are responsible for authorizing who at the clinic has access to NASS. This includes ensuring the list of authorized users is current and updated, for example, when there are personnel or position changes.

1.3 Accessing NASS 2.0

NASS 2.0 can be accessed at https://artreporting.cdc.gov/. Enter your NASS 2.0 User ID and case-sensitive password on the Welcome page and select Log In. If this is the first time accessing NASS 2.0, or if you have an expired password, you will be directed to change your password.

If you have forgotten your password or User ID, use the links on the NASS Welcome page to request your User ID or reset your password. Forgotten NASS User IDs and temporary passwords are sent to the email address associated with your NASS 2.0 account.

Section 2: Menu Items and Main Page

2.1 Menu Items

After signing into NASS, you will be directed to the Main page. A menu is available on the Main page (as well as on all pages in NASS), and includes the following resources:

- Main Page: Use this link to return to the Main page when you are on any other page.

- NASS Quick Start: The NASS Quick Start answers questions about setting up and using NASS in a short reference format.

- FAQ: A page with links to frequently asked questions sorted by topic. Browse by topic and review directly on the FAQ page.

- Definitions & Manuals: Expand this link to find Data Definitions, this User's Guide, Submission Guide, and Import Manual.

    o Data Definitions: Once you select 'Data Definitions', you will be directed to the data definitions page. On the Data Definitions page, you can select links for a comprehensive listing of definitions for all NASS 2.0 cycle data elements or definitions by data entry page. For easy reference, you can review individual definitions when entering data throughout NASS 2.0 by selecting the question mark icon at the end of each question.

    o Submission Guide: The complete guide for the upcoming reporting year will be posted prior to CDC's reporting deadline with step-by-step submission instructions.

    o Import Manual: The import manual includes details on data technical specifications and quality control checks.

- Cycle Worksheet: A cycle worksheet is a printable PDF document developed for clinic staff to use if they wish to record the data required for entry into NASS onto a hard-copy document first. The worksheet has been designed to mirror the NASS website data entry pages. Please note that the use of this worksheet is optional, and that all cycle data must be reported electronically in NASS.

- Communications: Formal communications from CDC and/or Westat will be posted under communications. In some instances the communications may be a copy of a document that was already distributed to clinics.

- Importing: Importing is for clinics that choose to extract data from their electronic medical record, and prepare and upload complete annual data files to the NASS system for import into NASS 2.0. Clinics choosing to import their annual data into NASS are responsible for ensuring that all required data are extracted correctly from other systems to be uploaded to NASS for programmatic quality control review. The files must pass all NASS data checks before they can be cleared for import into NASS.

Clinics should plan to allocate additional time before CDC's reporting deadline to prepare their import files, receive feedback from NASS quality control review, and make corrections to their data prior to file acceptance and import into NASS. After a clinic's data are imported into NASS, the clinic must perform all standard annual submission steps through NASS 2.0 to complete CDC reporting requirements.

Expand 'Importing' in the NASS 2.0 menu to access the import manual and companion documents with details on data technical specifications and quality control checks. If your clinic is considering importing annual data from your medical record system or through a third-party vendor, please contact the NASS Help Desk early in the planning process to review the timeline and importing requirements.

2.2 Enter Cycle Data

To begin entering a cycle for a new or existing patient, use the 'Enter Cycle Data' section on the Main page. First, select an option from the 'Select patient' dropdown to indicate if the cycle you would like to enter is for a new or existing patient, or if you are unsure if the patient is new or existing. If the patient is new, select 'New patient' from the dropdown, then select 'Go'. You will then be directed to the Initial Reporting page to begin data entry.

If the patient already exists in NASS, select 'Existing patient in NASS' from the 'Select patient' dropdown. You will then be directed to the 'Find Existing Patient' page. To find an existing patient, search using any of the following identifier fields: patient DOB, optional identifiers, sex of patient, and/or NASS patient ID. To generate a list of all patients, leave the search fields blank and select the 'Find' button. Note that you can search for any patient entered in NASS during any previous reporting year, as long as from your same clinic (i.e., under the same NASS clinic ID).
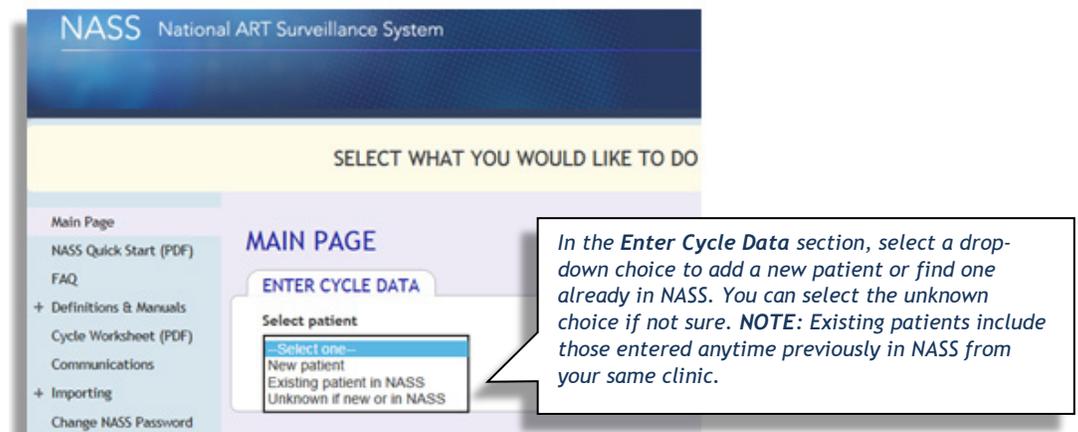
If you are unsure if the patient exists in NASS, select 'Unknown if new or in NASS' from the 'Select patient' dropdown. A message will appear to direct you to the 'Search Data' section on the Main page. If you are unable to find the patient, return to the 'Enter Cycle Data' section and select 'New patient' from the dropdown. For more details on performing patient searches and using search results, refer to the 'Search Data' section of this guide.

2.3 Submit or View Annual Data

The deadline for reporting ART cycle data to CDC is December 15 of the year after which cycles were started. CDC will confirm the date of the submission deadline for each reporting period 90 days before the deadline. Select 'Communications' from the NASS 2.0 menu to reference CDC communications about the submission deadline and reporting requirements.
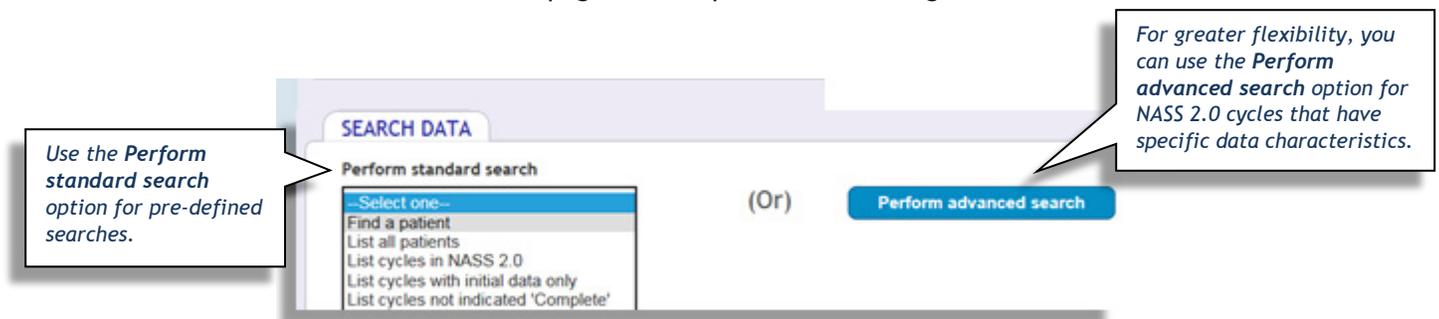
At the time the submission deadline and requirements for that reporting year are announced, users can select an activated reporting year in the 'Submit or View Annual Data' section on the NASS 2.0 Main page to begin the submission process in NASS 2.0.

The submission process includes a step requiring every clinic to enter or update and finalize their clinic profile data for that particular reporting year. This is the time that clinics will provide current profile information including their address, services provided, key staff, and laboratory accreditation status. In addition, the submission process includes a step in which every clinic will be required to review and verify their NASS-generated clinic table for that reporting year.

For additional information on submitting NASS data, expand 'Definitions & Manuals' to select 'Submission Guide' from the NASS 2.0 menu. The complete guide for the upcoming reporting year will be posted prior to CDC's reporting deadline with step-by-step submission instructions.

2.4 Search Data (Standard and Advanced Searches)

The 'Search Data' section on the Main page has two paths for searching data.

*For greater flexibility, you can use the **Perform advanced search** option for NASS 2.0 cycles that have specific data characteristics.*

*Use the **Perform standard search** option for pre-defined searches.*

SEARCH DATA

Perform standard search

--Select one--
Find a patient
List all patients
List cycles in NASS 2.0
List cycles with initial data only
List cycles not indicated 'Complete'

(Or) **Perform advanced search**

The first is to perform a set of standard searches. The searches can be accessed from the 'Perform standard search' dropdown in the 'Search Data' section. The standard search options include:

- Find a patient: You will be directed to the 'Find existing patient' page. You will be able to search using patient DOB, optional identifiers, sex of patient, and/or NASS patient ID.

- List all patients: This search lists all patients that have been entered in NASS during any previous reporting period (i.e., since 2004, as long as under the same NASS clinic ID).

- List cycles in NASS 2.0: This search lists all cycles that have been entered in the NASS 2.0 website (i.e., cycles with a start date anytime since January 1, 2016, as long as under the same NASS clinic ID).

- List cycles with initial data only: Use this search to continue entering data for NASS 2.0 cycles that only have initial data entered so far (e.g., cycle intent that has been entered prospectively).

- List cycles not indicated 'Complete': This search lists any NASS 2.0 cycle that has not been marked complete by the clinic. (This search also will include cycles with only initial data entered.) Refer to the 'Cycle Complete' section of this document for more information about completing cycles in NASS. Please note that all cycles for a reporting period must be marked complete prior to data submission.

For each of these standard searches, there is an option to limit results to a certain reporting period. This option will be available after the first reporting period is initialized in NASS. After you select a search from the dropdown, select the 'Go' button for search results.

The second option is to perform an advanced search. The advanced search provides flexibility in finding specific cycles entered in NASS 2.0. Please note that advanced searches are limited only to those cycles that have a start date since January 1, 2016. To access the advanced search, select the 'Perform advanced search' button in the 'Search Data' section on the Main page. You will then be directed to the 'Advanced Search for NASS 2.0 Cycles' page.   This page has multiple options for searching cycles, including patient profile characteristics, reasons for ART, the type of ART performed, canceled cycles, PGD/PGS, number retrieved or transferred, outcome of transfer or pregnancy, and birth information. Select the cycle parameters you wish to include in the search results and leave any additional options blank.

2.5 Search Results

All results for standard and advanced searches are displayed in either a patient or cycle search results grid, depending on the type of search you performed. Patient search results include columns for NASS patient ID, optional ID 1 and 2, patient date of birth, and sex of patient. Cycle search results include NASS patient ID, optional ID 1 and 2, NASS cycle ID, patient date of birth, cycle start date, reporting year, cycle status, and cycle intent.

- Reporting year will remain 'Unassigned' until the specific requirements for the reporting period are initialized in NASS 2.0.

- Cycle status refers to the current stage of data entry for each cycle. The cycle status categories are: 'Initial Data', 'Open', or 'Complete'. 'Initial data' is when only the Initial Reporting page has been completed for a cycle. Note that cycles with 'Initial Data' status require additional data entry by the clinic before they can be considered completed. An 'Open' cycle has more than just Initial Reporting data entered on subsequent pages but the clinic has not indicated that it is complete yet. An 'Open' cycle can be marked complete at any time by the clinic once all required data are entered. A 'Complete' cycle status means that the cycle has been indicated complete by the clinic. You can edit data for a 'Complete' cycle as long as it is prior to finalizing and submitting your annual reporting year data in NASS 2.0.

- Cycle intent refers to the intended embryo state or banking status of the cycle. Search results for cycle intent are categorized as: 'Banking', 'Fresh', or 'Frozen'. Any cycle with the intention

of banking all eggs/embryos will be categorized as 'Banking'. Non-banking cycles are designated either 'Fresh' or 'Frozen' based on the intended embryo state.

The list of search results can be sorted alphabetically or numerically by selecting an arrow in one of the column headers. In addition, the results can be downloaded to Excel or PDF for clinic use. On each results grid, there are additional actions that can be performed.

- Patient Search Results grid. There are two actions that can be performed from the Patient results grid: List all cycles or start new cycle.

- o Select the check box next to a patient in the search results, and then select the 'List All Cycles for Patient' button to generate a list of all NASS 2.0 cycles for that patient. More than one patient can be selected at a time to list cycles for multiple patients.

- o Select the check box next to a patient in the search results and select the 'Start New Cycle' button to be directed to the Initial Reporting page and begin entering cycle data for the patient. This option can only be used for one patient at a time.

- Cycle Search Results grid. There are five actions that can be performed from the cycle results grid: Go to record, list cycle data, start new cycle, cycle complete, and delete cycle.

o Select the check box next to a cycle in the search results, and then select the 'Go To Record' button to go to the Initial Reporting page for the cycle. You may then navigate to the page where you would like to enter or review data. This action can only be performed for one cycle at a time.

o Select the check box next to a cycle in the search results, and then select the 'List Cycle Data' button to generate a list of all data points that have been entered for the cycle thus far. This action can only be performed for one cycle at a time.

o Select the check box next to a cycle in the search results, and then select the 'Start New Cycle' button to go to the Initial Reporting page and begin a new cycle for that patient. This action can only be performed for one cycle or patient at a time.

o Select the check box next to a cycle in the search results, and then select the 'Cycle Complete' button to mark the cycle as complete. Use this action only if you have confirmed that all data have been entered for a cycle. This action can be completed for more than one cycle at a time. If you are unsure if a cycle is complete, reference the 'cycle status' column of the search results. Please note that any cycle with the status of 'Initial data' cannot be marked completed until additional cycle data have been entered on subsequent data entry pages.

o Select the check box next to a cycle in the search results, and then select the 'Delete Cycle' button to delete a cycle. This action can only be performed for one cycle at a time.

Reminder: Return to the Main page at any time by selecting the 'Main Page' link in the NASS menu.

Section 3: Data Entry Pages

3.1 Initial Reporting and Page Navigation

When entering a new cycle in NASS, you will begin on the Initial Reporting page. NASS 2.0 users enter prospective data for each cycle on the Initial Reporting page. For a new patient, the date of cycle reporting is the only pre-filled field. The date of cycle reporting is the current date when the cycle is entered initially in NASS. Once the page is saved, the date of cycle reporting does not change, even if the cycle is entered across multiple days. For an existing patient in NASS, the date of cycle reporting, patient ID, optional identifier(s), patient date of birth, and patient sex are pre-filled. For more information about how to start a cycle, see the 'Enter Cycle Data' section of this guide.

Data entered about the intention of the cycle become read-only after saving the Initial Reporting page and cannot be changed. However, users can correct the patient's date of birth or update the patient's optional identifiers on the Initial Reporting page anytime with Edit buttons that are available after the data become read-only. Please note that changing the patient date of birth or optional identifier(s) will result in the change being made for all cycles entered previously in NASS 2.0 for that patient.

Once data entry on the Initial Reporting page are complete, select the 'Save' button to save data and remain on the same page, or the 'Next' button to save data and move to the next page. After data are saved, you may also use the data entry page tabs at the top of the page to navigate. Please note that not all data entry pages are available after the Initial Reporting page is completed.

NASS data entry pages may be inactive (or active) because of cycle type, cycle progression, or data entered on other pages. Relevant data entry pages will become active as data are entered for the cycle. You do have the option to go back to earlier pages and make changes (excluding the majority of data elements on the Initial Reporting page). This may result in pages that were previous active becoming inactive, or vice versa. Please note that you cannot manually open inactive pages, and there are no data on inactive pages.

Navigate to different data entry pages by selecting any active tab. You will be prompted to save newly entered data before leaving the page.

| INITIAL REPORTING | ART PERFORMED | REASON FOR ART | FEMALE PATIENT HX & PHYSICAL | SOURCES & CARRIERS | STIMULATION & MEDICATIONS | RETRIEVAL | MANIPULATION | TRANSFER | OUTCOMES | BIRTH |

To navigate between any active page, use the 'Previous' or 'Next' buttons, or use the data entry tabs. Any unsaved data will not be retained if you navigate using the data entry tabs. On select pages, there are additional buttons for navigation. Use 'Select Different Patient' to go to the 'Existing Patient' search page, use 'Select Another Cycle for Same Patient' to go to a list of all NASS 2.0 cycles for the patient, and 'Main Page' to return to the Main page.

> *After entering data on any NASS page, select the **Save** button to save data and stay on that page. Selecting the **Previous** or **Next** buttons also saves data before leaving the page. **NOTE**: Some NASS pages have different button choices.*

3.2 Data Alerts

When you save cycle data on a NASS 2.0 page, a data alert box may appear with one or more messages about two types of data checks. One type is for data that are mandatory to fix before you can save the page (e.g., for a question with missing or illogical data). The other is for data that should be reviewed and confirmed before continuing to save the page (e.g., for data outside of the usual range). A data element that is mandatory to fix is marked with an asterisk by it for easy identification on the page. Please note that the asterisk will not disappear for data that you have resolved until you save the page again. Note that you may drag the data alert box to another location on the NASS page for easy reference while reviewing and editing your data. Each data alert message has a unique reference code in parentheses. It is helpful to reference this number when contacting the NASS Help Desk with a question.

3.3 Cycle Complete

Before submitting annual NASS 2.0 data to CDC, your clinic must ensure that all available data are entered for each cycle started and that your clinic has designated in NASS that the cycles for the reporting period are 'Complete'.

At the time you are on a NASS 2.0 data entry page and have finished entering all data for that particular cycle, there is a section at the end of select NASS 2.0 data entry pages that will be open for you to indicate if the cycle is complete. This section will be available based on the type of cycle being reported (e.g., banking vs. IVF) or the progression and outcome of the cycle (e.g., cancellation, retrieval, transfer, pregnancy).

An alternative way to indicate a cycle is complete is to perform a standard search on the NASS 2.0 Main page for a list of cycles that have more than just prospective or initial data entered but that are still categorized as 'open' in NASS—that is, they have not been designated as completed cycles. You can indicate that a cycle is complete in the search results page. Note that you cannot mark cycles complete that have only initial data entered in NASS. You must first enter additional data about the actual ART performed and the results of the cycle.