# NASS USER'S GUIDE

This guide contains instructions to access the NASS website and enter ART clinic and cycle-specific data. Sections provide information on getting started in NASS, 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 is required prospectively: a) at least one day prior to oocyte retrieval for all natural cycles using fresh embryos created from fresh eggs; b) at least one day prior to thaw for all frozen oocyte or frozen embryo cycles; and c) within four days of cycle initiation for all other cycles.

#### **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 an email link to the NASS Help Desk are at the end of every NASS 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. 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 NASS 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 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, 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 will have a unique NASS 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 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.

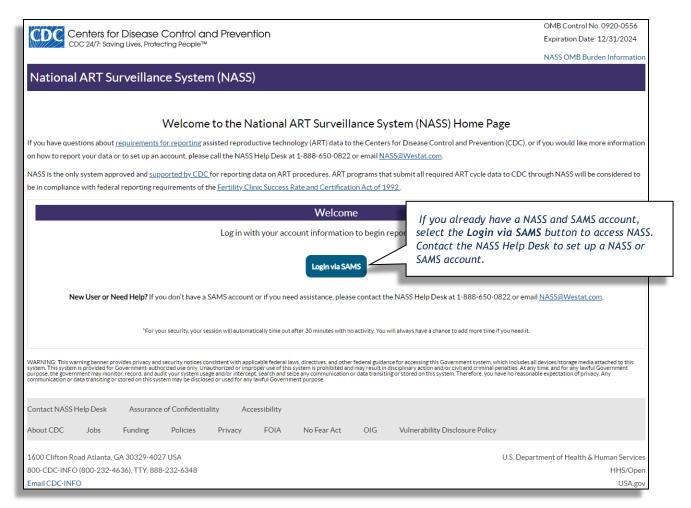
The Medical Director and each of the account administrators will have a 'User Administration' link available in the NASS menu. Use this link to add and delete users, as well as change account administrator status. To add a user account for a staff member, an individual email address is required.

The Medical Director and optional NASS 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

The NASS home page can be accessed at <a href="https://artreporting.cdc.gov/">https://artreporting.cdc.gov/</a>. Clinic staff with a NASS account must also establish an account through SAMS to log into NASS. SAMS stands for the Secure Access

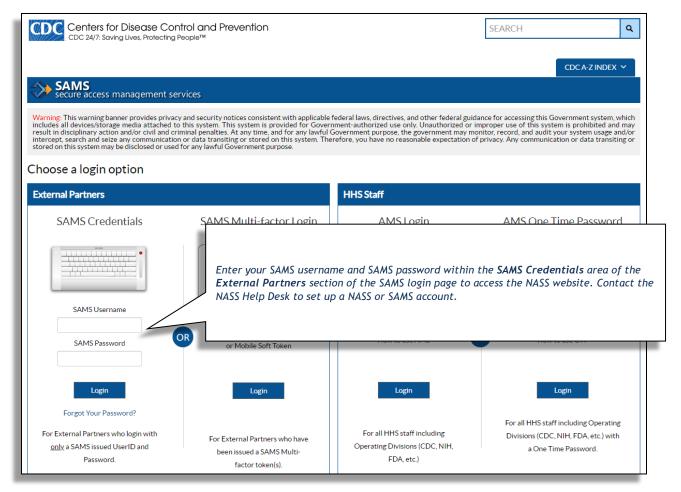
Management Services Partner Portal. It is a website that provides centralized access to computer applications operated by CDC. Using SAMS to log into NASS is one of the ways CDC will continue to control and protect sensitive NASS data. This is the only way to log into NASS and report ART data to CDC, effective fall 2022.



Source: Password-protected website: <a href="https://artreporting.cdc.gov/">https://artreporting.cdc.gov/</a>

Clinic staff can be added or deleted in NASS as usual by the clinic's NASS account administrators, which will trigger the SAMS account process. Clinic staff that no longer have a NASS account will not be able to access NASS through SAMS, regardless of their SAMS account status.

Clinic staff with a new NASS user account will receive an email invitation from SAMS with the subject "U.S. Centers for Disease Control: SAMS Partner Portal - Invitation to Register." After receiving the invitation email with instructions, NASS users must complete the online SAMS profile. After completing this registration step, the user will immediately receive a second email from SAMS with instructions for completing the identity verification step. After identity verification, you will receive additional communication from SAMS that your SAMS account to access NASS is activated.



Source: https://sams.cdc.gov

Refer to the SAMS Guide posted under the NASS 'Definitions & Manuals' menu for more details about the SAMS process.

## Section 2: Menu Items and Main Page

#### 2.1 Menu Items

After logging 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.
- 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, Import Manual, and SAMS Guide.

- Data Definitions: Once you select 'Data Definitions', you will be directed to the data definitions page. On the Data Definitions page, select the link for a comprehensive listing of definitions for all NASS cycle data elements. For easy reference, you can review individual definitions when entering data throughout NASS by selecting the question mark icon at the end of each question.
- 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.
- SAMS Guide: The SAMS guide includes information about SAMS and the process to establish a SAMS account to access NASS.
- 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 is 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 will be posted here. In the majority of cases, the communications will 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 for import into NASS. 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.

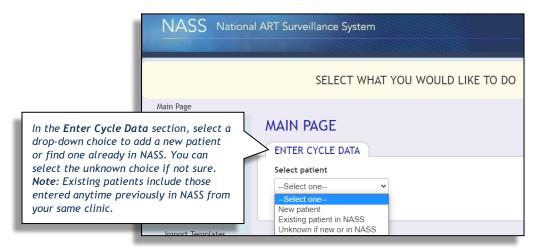
Clinics should plan to allocate additional time before CDC's reporting deadline to prepare their import files, receive feedback from NASS quality control review, and make corrections to their data prior to file acceptance and import into NASS. After a clinic's data are imported into NASS, the clinic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

Expand 'Importing' in the NASS 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.



Source: Password-protected website: <a href="https://artreporting.cdc.gov/">https://artreporting.cdc.gov/</a>

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 menu to reference CDC communications about the submission deadline and reporting requirements.

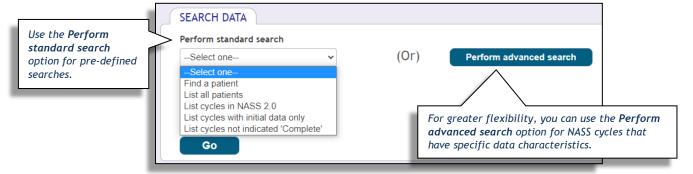
At the time the submission deadline and requirements for that reporting year are announced, users can select an activated reporting year in the 'Submit or View Annual Data' section on the NASS Main page to begin the submission process in NASS.

The submission process includes steps 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 review and verify their annual data for that reporting year.

For additional information on submitting NASS data, expand 'Definitions & Manuals' to select 'Submission Guide' from the NASS 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 NASS Main page has two paths for searching data.



Source: Password-protected website: <a href="https://artreporting.cdc.gov/">https://artreporting.cdc.gov/</a>

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 NASS with a start date anytime since January 1, 2016 (i.e., when this version of the NASS website was launched), as long as under the same NASS clinic ID.
- List cycles with initial data only: Use this search to continue entering data for NASS 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 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. 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. Please note that advanced searches are limited only to those cycles that have a start date since January 1, 2016 (i.e., when this version of the NASS website was launched). 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, PGT, 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.

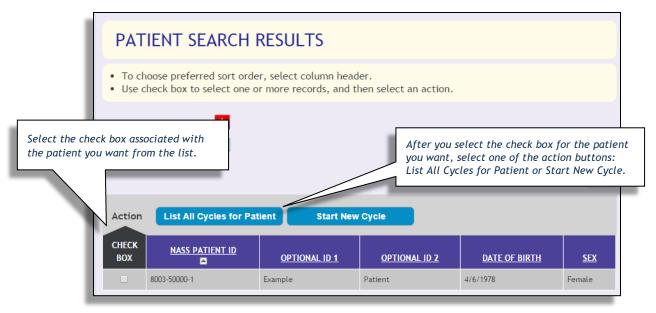
#### 2.5 Search Results

All results for standard and advanced searches are displayed in either a patient or a 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 IDs, NASS cycle ID, patient date of birth, cycle start date, reporting year, cycle status, and cycle type.

- Reporting year will remain 'Unassigned' until the specific requirements for the reporting period are initialized in NASS.
- 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.
- Cycle type refers to the actual type of cycle performed. Search results for cycle type are categorized as either nondonor only, donor only, both nondonor and donor (shown as 'Both Non/Donor' in the grid), banking, or research.

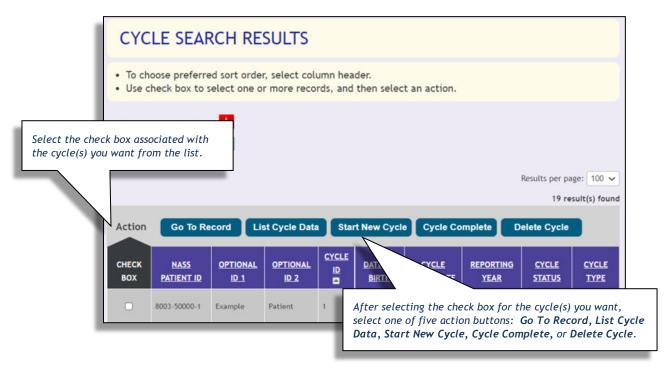
The list of search results can be sorted alphabetically or numerically by selecting an arrow in one of the column headers. In addition, the results can be downloaded to Excel or PDF for clinic use. On each results grid, there are additional actions that can be performed.

- Patient Search Results grid. There are two actions that can be performed from the Patient results grid: List all cycles or start new cycle.
  - 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 NAS cycles for that patient. More than one patient can be selected at a time to list cycles for multiple patients.



Source: Password-protected website: https://artreporting.cdc.gov/

- 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.



Source: Password-protected website: https://artreporting.cdc.gov/

- 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.
- 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.
- 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.
- 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.
- Select the check box next to a cycle in the search results, and then select the 'Delete Cycle' button to delete a cycle. This 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 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, update the patient's race or ethnicity, or change 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 revising any of these fields will result in the change being made for all cycles entered previously in NASS 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.

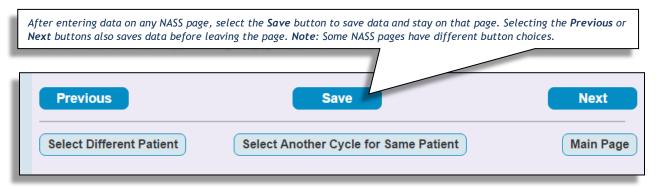
NASS data entry pages may be inactive or active because of cycle type, cycle progression, or data entered on other pages. Relevant data entry pages will become active as data are entered for the cycle. You do have the option to go back to earlier pages and make changes (excluding the majority of data 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 PART PERFORMED REASON FOR ART PATENT HX & SOURCES & STIMULATION & RETRIEVAL MANIPULATION TRANSFER OUTCOMES BIRTH

Source: Password-protected website: https://artreporting.cdc.gov/

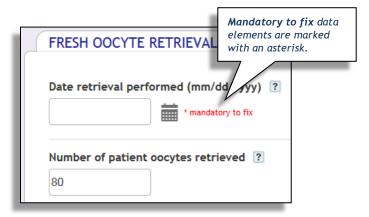
To navigate between any active page, use the 'Previous' or 'Next' buttons on that page, or use the data entry tabs. Any unsaved data will not be retained if you navigate using the data entry tabs. On select pages, there are additional buttons for navigation. Use 'Select Different Patient' to go to the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



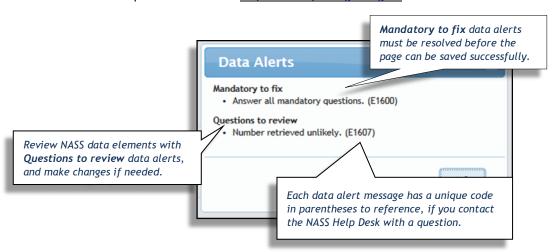
Source: Password-protected website: https://artreporting.cdc.gov/

#### 3.2 Data Alerts

When you save cycle data on a NASS 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.



Source: Password-protected website: https://artreporting.cdc.gov/



Source: Password-protected website: <a href="https://artreporting.cdc.gov/">https://artreporting.cdc.gov/</a>

#### 3.3 Cycle Complete

Before submitting annual NASS 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'.

When you are on a NASS data entry page and have finished entering all data for that particular cycle, there is a section at the end of select NASS 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).



Source: Password-protected website: <a href="https://artreporting.cdc.gov/">https://artreporting.cdc.gov/</a>

An alternative way to indicate a cycle is complete is to perform a standard search on the NASS 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. This action can be completed for more than one cycle at a time. 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.

