SART Reporting

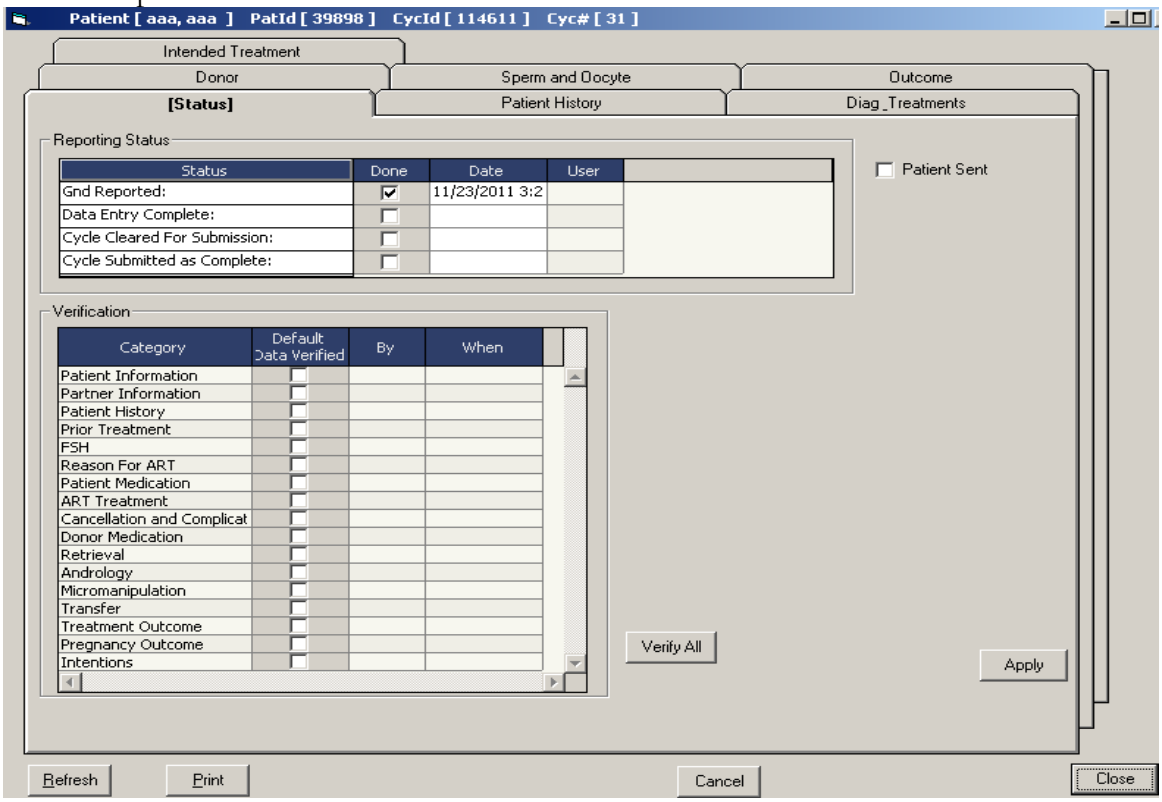
User Instruction

The reporting of ART (Assisted Reproductive Technology) cycle is required by the CDC. www.sartcorsonline.com is a commonly used format amongst many practices. This website is used to compile the data which is then reported to Westat (the current vendor responsible for reporting all ART data to the governmental CDC). To make the SART reporting more efficient in RESource, the SART Reporter was created. This will decrease the risk of data entry errors and help to ensure accurate data submission. Access to the ART reporter of valid cycles occurs via the Cycle menu as well as through a SART Cycle Maintenance screen (where all cycles and their statuses can be viewed).

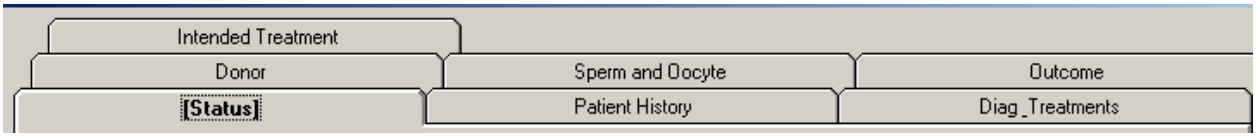
SART Reporter Forms via the Cycle Menu

Note: this tool only works on valid IVF cycles. This option is not available on RE cycles.

1. Enter patient name into Patient Explorer.
2. Select the desired cycle by highlighting it.
3. On the main toolbar, select Cycle,
4. Scroll to Art Data.
5. A window pops up displaying the SART reporter forms.
6. A user can verify data on the Verification List as well as navigating through the tabs. Please see below for details on this process.



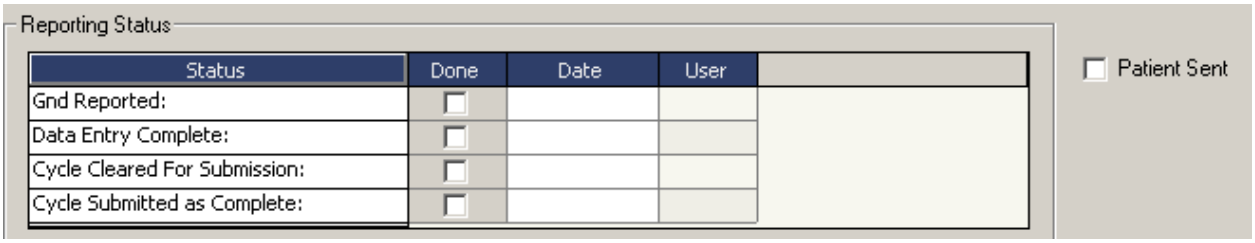
Tabs



Status Tab

Displays an overview and status of verified data required for SART reporting.

- **Reporting Status Section**
  This is a summary of progress when reporting to SART. Besides 'GND Reported', the other statuses are user entry with no default value. Therefore, no data will be pulled from RESource and requires full manual user entry. This provides the option for a facility to monitor quality assurance in the steps of SART data verification, collection, and reporting. Again, this **Reporting Status** section is completely optional and a choice of each facility.



GND Reported:
SART guidelines require that GND date be reported within four days of the event; documenting the cycle start. SART Guidelines require patient information and cycle type for the start to be compliant with your prospective reporting. The GND report is compiled and exported through the SART Cycle Maintenance screen. (Please see the SART Cycle Maintenance instruction for more details SartCycleMaintenanceWindow) When this step is complete, 'GND Reported' in the Reporting Status of the Status Tab will automatically complete with:

- 'Done' box will be checked
- Auto populate with Date/Time report was compiled
- Auto populate with user initials who exported the GND report in the SART Cycle Maintenance screen.

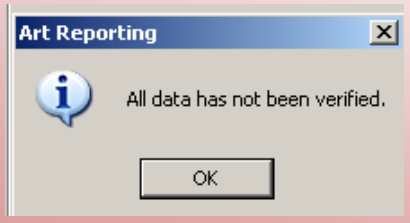
Data Entry Complete:
This status is a user entry field for monitoring if all categories have required data entered. Check 'Done' box when all data is verified in all the categories of all tabs.

Cycle Cleared for Submission:
This is a user entry field for monitoring the following:

- **'Data Entry Complete'** status is checked **'Done'**
- The cycle is cleared
- All required data is verified

Check the **'Done'** box when this specified criteria has been met.

Note: If Data Entry Complete is not marked 'Done' and a user attempts to check off Cycle Cleared For Submission; a popup will occur that disallows user to continue marking this as 'Done'.



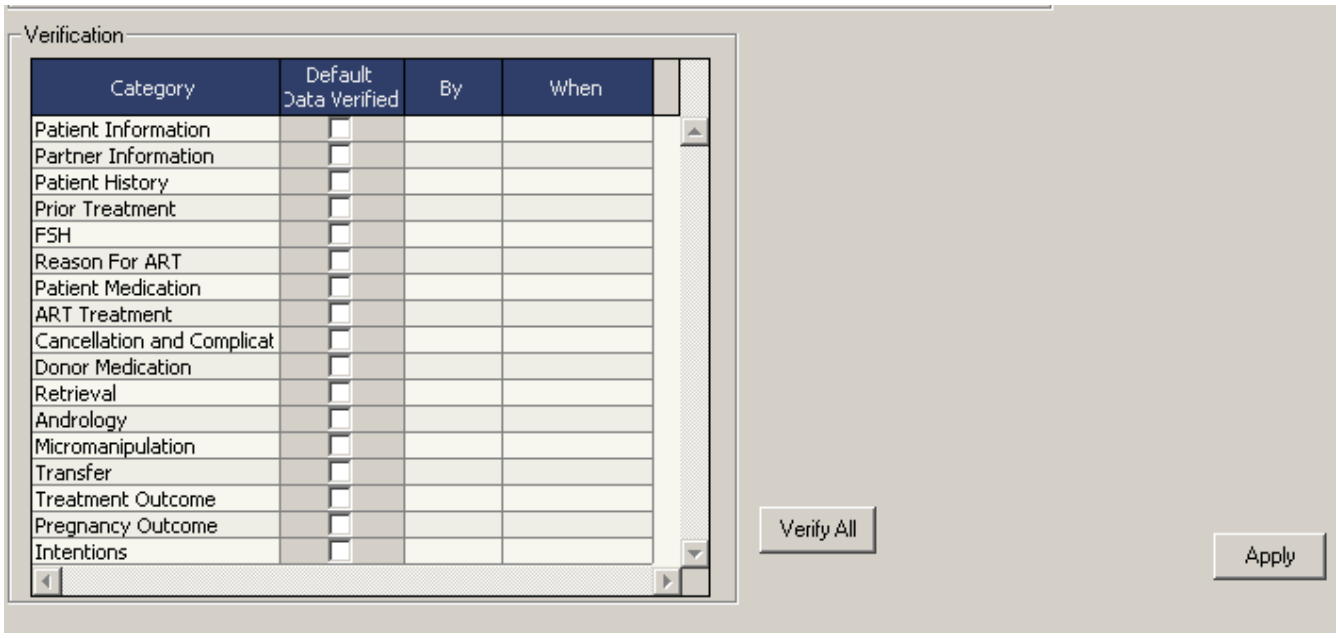
Cycle Submitted as Complete:

This is a user entry field for monitoring whether this cycle has been exported to SART as 'Complete'. Check the **'Done'** box when cycle has been compiled and exported as 'Submit Selected Cycle Completions' in the SART Cycle Maintenance screen. (Please see the SART Cycle Maintenance instruction for more details SartCycleMaintenanceWindow.)

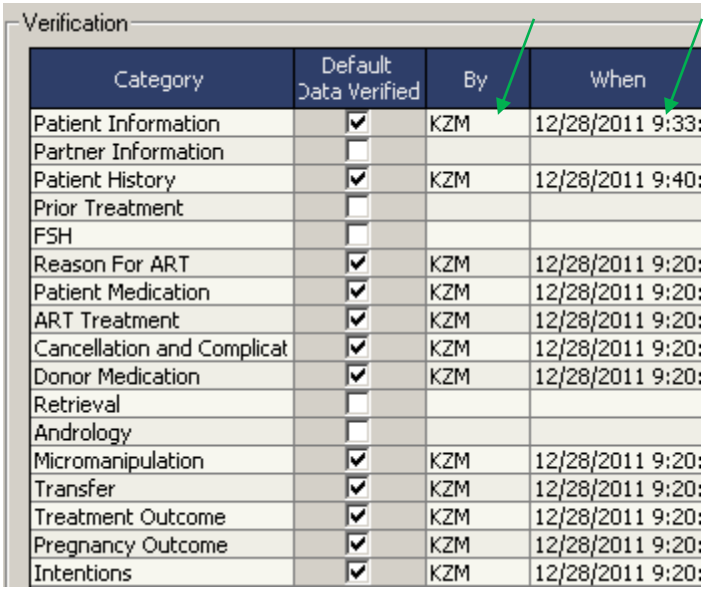
TIP: A completed cycle in SART website is a cycle where all pertinent fields have been addressed and the outcome of the cycle has been documented.

- **Verification Section**

Displays a checklist for all tabs and its designated categories of data. This checklist displays a running status of which categories (in the tabs Patient History, Diag_Treatments, Donor, Sperm & Oocyte, Intended Treatment, and Outcome) have been reviewed and the '**Data Verified'** box has been checked.



When data has been verified in a category, the '**Default Data Verified'** box will be checked with the user initials and date time stamp. (green arrows).



Patient History Tab

Tab which contains the categories for patient and partner information, patient history, prior treatment, and FSH level.

Diag_Treatments Tab

Tab which contains the categories for reason for ART, patient medication, ART treatment, cancellations and complications.

Donor Tab

Tab which contains the categories for donor medication and donor info.

Sperm and Oocyte Tab

Tab which contains the categories for retrieval, andrology, micromanipulation, and transfer.

Outcome Tab

Tab which contains the categories for treatment outcome and pregnancy outcome.

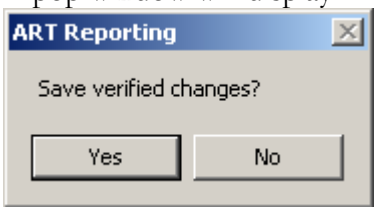
Intended Treatment

Tab which contains the categories for ART intended treatment (aka Intentions).

Other Window Buttons in SART Reporter Forms

- Patient Sent: This is an optional feature for a facility to monitor the first reporting of the patient record that has been sent to SART. If the patient already exists in SART (such as from a previously reported IVF cycle in the current year), then check this box. This is way to monitor cases that are still open on SartCorsOnline website.
- Verify All: Click this to verify all the data in all categories. This is a shortcut to replace a user navigating through all tabs to each category to checkmark **'Data Verified'**.
- Apply: Click 'Apply' in any tab to simultaneously update the verified data status in both the category itself **AND** the verification checklist. (Please see 'Verifying Data in SART Reporter forms' section of this work instruction for more detail.)
- Refresh: Click to update window to reflect current changes in the fields of data.

1. After modifying fields of data (such as checking 'Data Modified'), click **Refresh.**
2. A pop window will display:



3. Click **Yes** to save changes.

- Print: Click to print hard copy of all Tabs and their respective categories. (Patient History, Diag_Treatments, Donor, Sperm and Oocyte, Intended Treatment, Outcome).
- Cancel: cancel any changes made and close form.
- Close: closes the SART forms window.

Verifying Data in SART Reporter forms

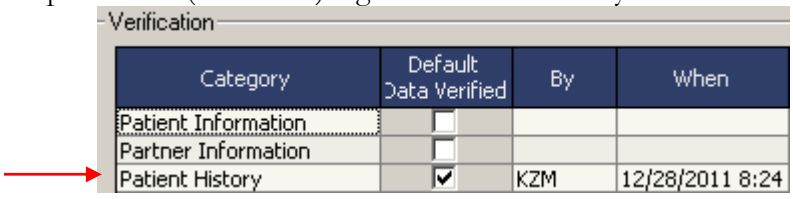
A user can verify data two ways:

- Checking off '**Default Data Verified'** in the Verification checklist in the Status Tab. These will simultaneously checkmark **'Data Verified'** in the category under the tab which it resides in as well.

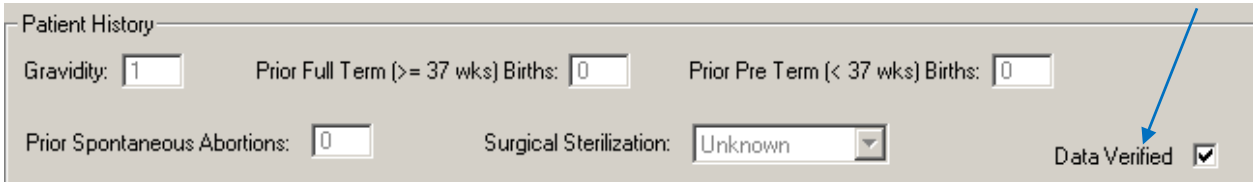
OR

- Checking off **'Data Verified'** in the category itself under the Tab which it resides. These will simultaneously checkmark '**Default Data Verified'** in the Verification checklist in the Status Tab as well.

For example, status of Patient History data verification will show in both the Verification list (red arrow) and the Patient History under the patient tab (blue arrow) regardless of which way the data is verified.



AND

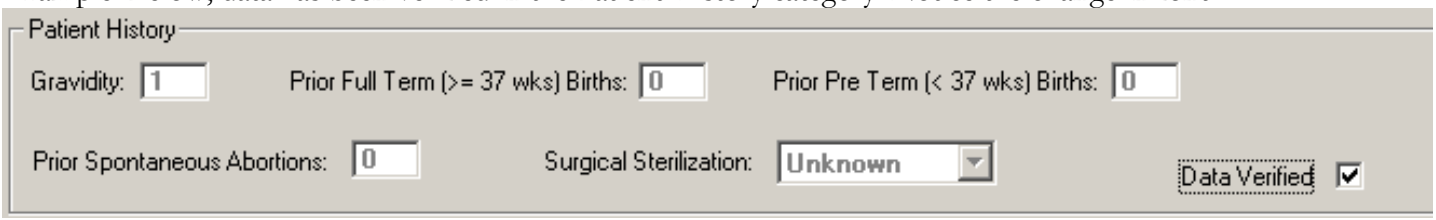


The SART Reporter forms contain three types of fields:

- Read only: data is directly pulled from what is already in RESource – any changes will need to be made in the original field. Example: Patient Information category will appear in grey regardless if the Data Verified box is checked.

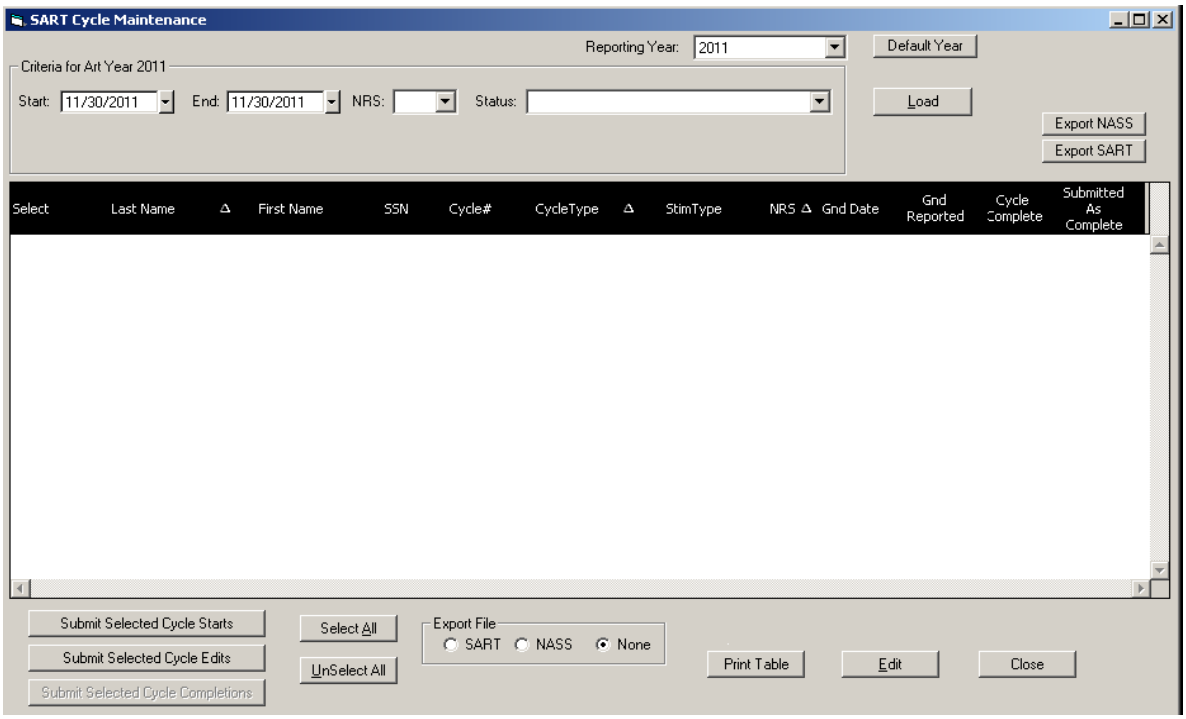
- User Entry with a default value: data will be pulled from RESource, but the user may change the value if needed. Any changes made in the SART reporter will not be reflected in the original fields.
- User entry with no default value: these fields pull some data from RESource but may require manual user entry as well. Example: Patient Medication section. These appear in regular unbold font.

Each data entry category in the forms contains a **Data Verified** checkbox. As the default data is verified, the user will check **Data Verified** and the system will change the regular dark type to a grey type in that data section. Example: Below, data has been verified in the Patient History category. Notice the change in font.

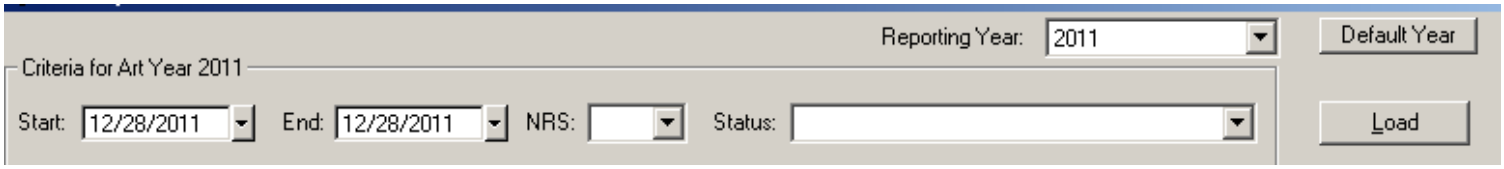


SART Cycle Maintenance Window

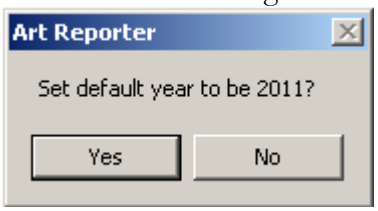
As data is verified in the SART Reporter forms, a user can start the process of compiling reports and exporting to SartCorsOnline. This is managed in the SART Cycle Maintenance window. This is accessed on the Main toolbar in Resource. Click on **Tools** on main toolbar in Resource, scroll to **ART Reporting. (**Please click on 'SARTReporting' to refer to video for instruction on how to compile and export a file to SartCorsOnline.)



Select Search Criteria

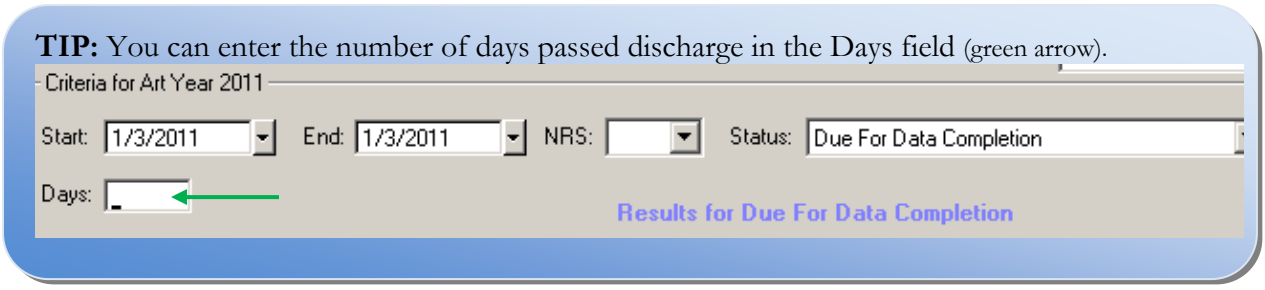


- Start: Select a beginning date of the date range to report to SART.
- End: Select the end date of the date range of records to report to SART.
- NRS: This is a dropdown selection box for selecting a nurse. This filters the records by a patient's primary nurse.
- Reporting Year: Select the year for the generated report.
- Default Year: Clicking this will prompt a pop up box:



  - Click 'Yes' will make 2011 the default year that automatically populates the 'Reporting Year' field.
- Status: Select which step in the cycle process for the generated report. Choices are:
  - *GND Not reported* = has gnd date and cycle start has not been reported to SART
  - *GND Reported* = cycle start has been reported to SART. Choose this to report any updated verified data fields that were not initially reported along with GND date.
  - *GND Reported-Not Submitted* = for use at end of year
  - *Due for Embryology Data*= lab procedure has been reviewed and locked. This verified data can now be exported to SartCorsOnline.

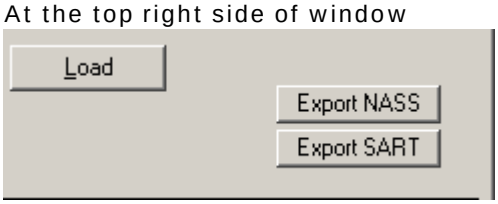
- *Due for Data Completion* = stim sheet has documented Npreg, Loss, canc, TAB, or Deliv or 'X' number of days have passed since Dsch



- *Data Complete- Stim Sheet Not Cleared*
- *Data Complete- SART Data not cleared*
- *Cycle Cleared – Not submitted*
- *Submitted as Complete*

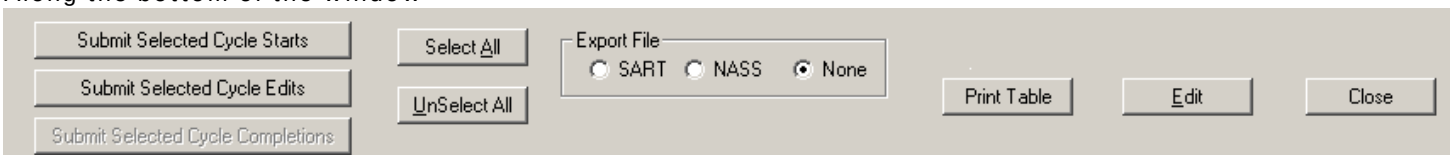
SART Cycle Maintenance Other Buttons:

At the top right side of window



- Load: After selecting your parameters, clicking this button will generate report.
- Export NASS: Click to export generated report into file format that Westat uses to report to CDC.
- Export SART: Click to export generated report into file format that SARTCorsOnline uses.

Along the bottom of the window



- Submit Selected Cycle Starts: (for the cycles with Select checked off) any data currently in the SART reporter forms is compiled in a file to export to SARTCorsOnline.
- Submit Selected Cycle Edits: (for the cycles with Select checked off) since the last export to SART, any updated or changed data currently in the SART reporter forms is compiled in a file to export to SARTCorsOnline. When cycle data is imported to SartCorsOnline, any new info will update for that uniquely identified cycle.
- Submit Selected Cycle Completions: (for the cycles with Select checked off) all data in the SART Reporter forms is sent to SARTCorsOnline and is submitted as complete cycle.
- Select All: checks off the Select box for each cycle listed in the grid.

- Unselect All: unchecks the Select check box for each cycle listed in the grid.

-

: Another selection box to choose type of file format to export for generated report.

- Print Table: Click to print hard copy all cycles in the grid.

- Edit: Click this after selected highlighted cycle and it will bring up the SART reporter forms accessed through the Art Data tool.

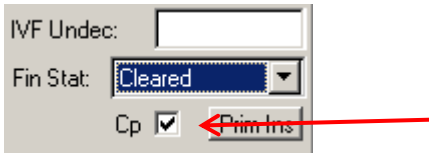
- Close: Closes the SART Cycle Maintenance Window

Grid Info

Select	Last Name	First Name	SSN	Cycle#	CycleType	StimType	NRS	Gnd Date	Gnd Reported	Cycle Complete	Submitted As Complete
☐	Do883_Doe	Wendy	DM0-00-093!	3	IVF	Down Reg	ATM	7/24/2001 1:	☐	☐	☐
☐	Va4811_Doe	Kathleen	DM0-00-477!	1	IVF	Antagonist	EH	7/24/2001 1:	☐	☐	☐
☐	Si5704_Doe	Shalini	DM0-00-566:	1	IVF	MicroFlare		7/24/2001 1:	☐	☐	☐
☐	Gr5488_Doe	Ester	DM0-00-544'	1	IVF	MicroFlare	MMJ	7/24/2001 1:	☐	☐	☐
☐	Pa2544_Doe	Pattiann	DM0-00-256'	2	IVF	Down Reg	MEM	7/24/2001 1:	☐	☐	☐
☐	He4298_Doe	Gail	DM0-00-427:	1	IVF	Down Reg	EH	7/24/2001 1:	☐	☐	☐
☐	Ha3628_Doe	Suzanne	DM0-00-362!	4	IVF	Antagonist	AJS	7/24/2001 1:	☐	☐	☐

Column Definitions:

- Select – click in this column to select this record for exporting
- Last Name: displays last name of the patient
- First Name: displays first name of the patient
- SSN: displays the social security number of the patient
- Cycle#: displays the cycle number of current record
- Cycle Type: displays type of cycle of current record
- Stim Type: displays stim type of current record
- NRS: displays nurse that completed this event?
- GND Date: displays the date of the 'GND' event (start date) of current record
- GND reported: system automatically checks off check box upon submitting the cycle start to SARTCorsOnline.
- Cycle complete: system automatically checks off check box upon marking the Cycle complete in the Stim Sheet.



TIP: See document 'Cycle Details' in Knowledge Base to see further details and instruction on Cp checkbox.

- Submitted as Complete: system automatically checks off check box upon submitting the final cycle data to SARTCorsOnline.