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**CARTR Plus:**

**BORN Information System Enhancements**

**Release Date: June 3<sup>rd</sup>, 2013**

**Presentation Date: June 3<sup>rd</sup>, 2013**

# Release Overview

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The BORN Information System was updated on the evening of June 3<sup>rd</sup>, 2013. Changes were done in the following areas:

- User interface changes
  - Landing page
  - Menu options: Data Quality, Acknowledgement, Batch Upload
  - Data submission acknowledgement
- #of US Fetal Sacs
- Data Quality Report changes
- Move and Delete Cycles

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BORN Information System Enhancements

# USER INTERFACE: LANDING PAGE

# Landing Page – Organization

- The user's organization is now displayed on the landing page

The screenshot shows the BORN UAT Portal interface. At the top left is the BORN Ontario logo. At the top right, the user's organization is identified as "Pacific Centre for Reproductive Medicine / Marlene A Elliott". A navigation menu includes links for Patient Search, Batch Upload, Data Quality Reports, Reporting, Acknowledgement, Administration, My Profile, Help, and Sign Out. The main content area features a "Patient Search" form with fields for Chart # or Cycle ID #, Date of Birth, and a Search button. Below the search form is a "Quick Links" section. The central part of the page displays a welcome message: "Welcome Marlene A Elliott - Pacific Centre for Reproductive Medicine", which is highlighted with a red rectangular box. Below this is an "Announcements" section with a table header for "Title" and "Date Posted". The table currently shows "No records to display." and includes pagination controls (1 of 1 pages) and a "Page size: 10" dropdown.

# Landing Page – Patient Records

- The filter for ART Patient Records is now saved for the duration of the user's login session
- If you follow the link to a particular cycle and then return to the landing page, the most recent filter settings will still be in place

**ART Patient Records**

Sort by Date:  Date from:  Date to:  Status:

Cycle Start Date	Cycle ID #	Cycle Type	Chart #	Date of Birth	Status	Created By	Last Updated
03 Jan 2013	<a href="#">FOIVF Jan 3</a>	Frozen oocyte IVF	A1234	01-Mar-1973	Draft	Marlene Elliott	07 Jan 2013
01 Jan 2013	<a href="#">FETJan1</a>	FET	A1234	01-Mar-1973	Draft	Marlene Elliott	07 Jan 2013
01 Jan 2013	<a href="#">OBJan1</a>	Oocyte banking	A1234	01-Mar-1973	Draft	Marlene Elliott	07 Jan 2013

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BORN Information System Enhancements

# USER INTERFACE: MENU CHANGES

# Menu Changes - Overview

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To better support the operational processes, the following changes were made:

- New menu options added for Data Quality Reports and Acknowledgement
- Batch Upload and all related functionality (e.g., error correction) moved under single menu
- Order of menu items changed

# Data Quality Reports Menu

- New menu option added for Data Quality Reports on top menu as well as on Quick Links menu on the left navigation bar
- Menu contains links to data quality reports related to organization (e.g., hospital, midwife, fertility clinic)

The screenshot displays the BORN Ontario web application interface. At the top left is the BORN Ontario logo. The top navigation bar includes links for Patient Search, Batch Upload, Data Quality Reports (highlighted with a red box), and Reporting. Below this, a secondary navigation bar lists Administration and My Profile. A dropdown menu for Data Quality Reports is open, showing options: Cycle Reconciliation, Incomplete Treatment Cycle Record, and ART Potential Duplicate Cycles. The breadcrumb trail reads "BORN UAT Portal > Data Quality Reports". On the left, a Quick Links sidebar lists Patient Search, Batch Upload, Data Quality Reports (highlighted with a red box), Cycle Reconciliation, Incomplete Treatment Cycle Record, ART Potential Duplicate Cycles, and Reporting. The main content area is titled "Data Quality". An orange callout box at the bottom right states: "These reports continue to be available under Reporting – Administrative reports".



# Acknowledgement Menu

- Data Submission Acknowledgement functionality moved from Administration menu to new Acknowledgement menu
- New user role created for 'Organization Data Acknowledgement'
  - The ability to do data submission acknowledgement can now be assigned to a user independently of the local administration role

Pacific Centre for Reproductive Medicine / Marlene A Elliott

born Ontario

Patient Search • Batch Upload • Data Quality Reports • Reporting • **Acknowledgement** •

Administration • My Profile • Help • Sign Out •

BORN UAT Portal > Acknowledgement

**Quick Links**

- Patient Search
- Batch Upload
- Data Quality Reports
- Reporting
- **Acknowledgement**
- Administration
- My Profile
- Help
- Select Organization
- Sign Out

**Data Submission Acknowledgement**

Organization: Pacific Centre for Reproductive Medicine

Data Submission Type: Treatment Cycle Year: 2013 Quarter: Jan-Mar

Show all unacknowledged records

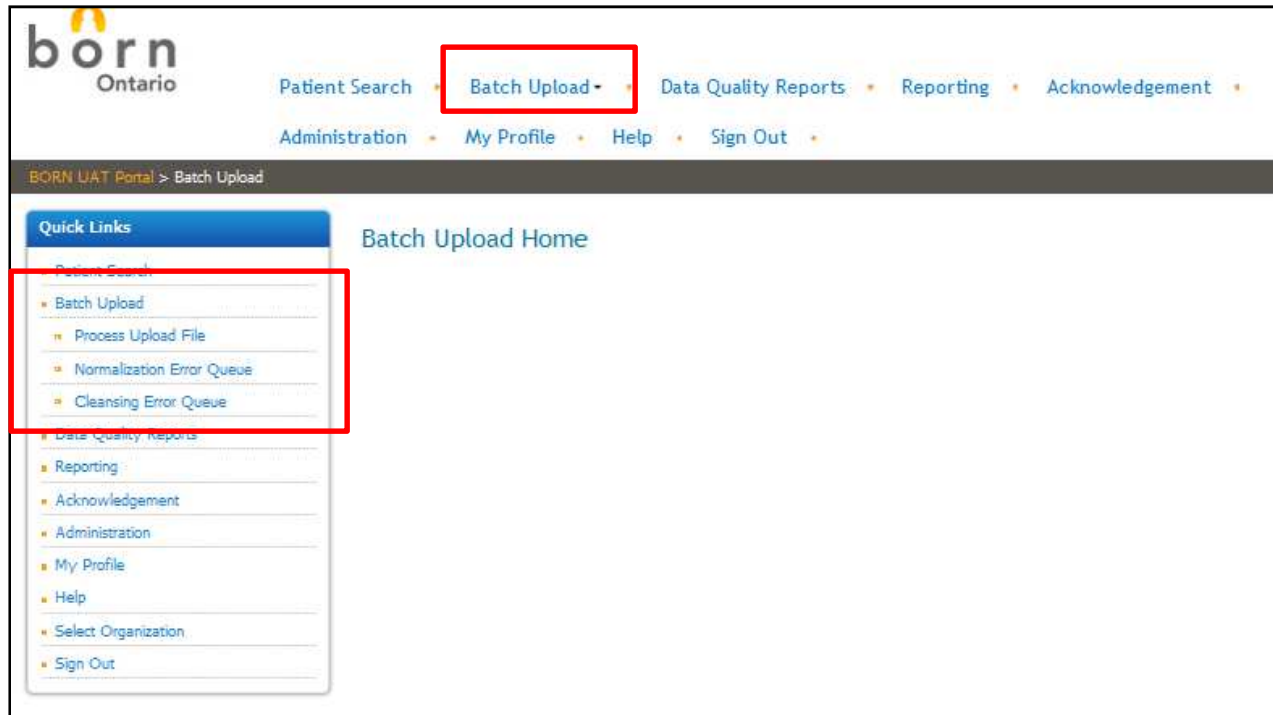
Year	Month	Data Submission	Data	Comments	Date/Ti Submitt
2013	January	ART Treatment Cycle	<input type="checkbox"/>	<input type="text"/>	
2013	February	ART Treatment Cycle	<input type="checkbox"/>	<input type="text"/>	Cycles
2013	March	ART Treatment Cycle	<input type="checkbox"/>	<input type="text"/>	Cycles

Acknowledge Selected Month(s) Cancel

Any users with the local administration role will continue to have access to the acknowledgement functionality

# Batch Upload Menu

- Batch Upload functionality, Queue Management, and Normalization Errors moved under single Batch Upload menu



# Batch Upload Menu (cont.)

- Previous Batch Upload screen moved to 'Process Upload File'

The screenshot shows the 'Batch Upload' menu on the left with 'Batch Upload' and 'Process Upload File' highlighted. The main area shows a table with columns: File Name, Date/Time Uploaded, User, Org Feed Code, Data Source, Status, and Submit. A row is highlighted with the status 'Processed with Errors'.

File Name	Date/Time Uploaded	User	Org Feed Code	Data Source	Status	Submit
BORN_FTCDRKH CARTRPLUS T 2013 0530 002 IVFFET_mandatory.csv	31-May-2013 07:18	melliott	FTCDRKH	CARTRPLUS	Processed with Errors	<input checked="" type="checkbox"/>

The screenshot shows a success message: 'You have successfully transferred the file: BORN\_FTCDRKH\_CARTRPLUS\_T\_20130523\_001\_RPTTest.csv to the BIS. Click on the Submit box to process the file.' Below the message is a table with columns: File Name, Date/Time Uploaded, User, Org Feed Code, Data Source, Status, and Submit. A row is highlighted with the status 'Pending'.

File Name	Date/Time Uploaded	User	Org Feed Code	Data Source	Status	Submit
BORN_FTCDRKH_CARTRPLUS_T_20130523_001_RPTTest.csv	04-Jun-2013 06:46	melliott	FTCDRKH	CARTRPLUS	Pending	<input type="checkbox"/>
BORN_FTCDRKH_CARTRPLUS_T_20130402_002_RPTTest.csv	09-Apr-2013 16:10	melliott	FTCDRKH	CARTRPLUS	Processed with Errors	<input checked="" type="checkbox"/>
BORN_FTCDRKH_CARTRPLUS_T_20130402_001_RPTTest.csv	09-Apr-2013 16:08	melliott	FTCDRKH	CARTRPLUS	Reprocessed Errors	<input checked="" type="checkbox"/>

## Additional changes

- New message appears after file successfully transferred via 'Add'
- Refresh button added to top of batch file list
- Pending statuses highlighted in red text

# Batch Upload Menu (cont.)

## Additional changes to Process Upload screen

- New 'Reprocessed Errors' status
  - A file with normalization and/or cleansing errors originally has a status of 'Processed with Errors'
  - When all records from this file that had cleansing errors are resubmitted in a later upload file, this status will change to 'Reprocessed Errors'

### Example:

Records that originally had cleansing errors in the purple file were resubmitted in the green file. The purple file is now 'Reprocessed Errors'

### Note:

The 'Reprocessed Errors' status only applies to cleansing errors. Normalization errors still need to be reprocessed and removed from the normalization queue.


**Batch Upload**

✓ You have successfully transferred the file: BORN\_FTCCPCFC\_CARTRPLUS\_T\_20130523\_001\_RPTTest.csv to the BIS. Click on the Submit box to process the file.


Filter from  to  **Filter** **Refresh** **+ Add**

File Name	Date/Time Uploaded	User	Org Feed Code	Data Source	Status	Submit
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20130523_001_RPTTest.csv</a>	04-Jun-2013 06:46	melliott	FTCCPCFC	CARTRPLUS	Pending	<input type="checkbox"/>
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20130402_002_RPTTest.csv</a>	09-Apr-2013 16:10	melliott	FTCCPCFC	CARTRPLUS	Processed with Errors	<input checked="" type="checkbox"/>
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20130402_001_RPTTest.csv</a>	09-Apr-2013 16:08	melliott	FTCCPCFC	CARTRPLUS	Reprocessed Errors	<input checked="" type="checkbox"/>







# Batch Upload Menu (cont.)

- New Batch Upload Details report provides additional information to users on processed batch file.
  - Run from  on Process Upload file screen
  - Replaces Batch Upload Error report. The error details are now found in the 'Errors detail' tab in the Batch Upload Details report

Batch Upload

 You have successfully transferred the file: BORN\_FTCCPCFC\_CARTRPLUS\_T\_20130523\_001\_RPTTest.csv to the BIS. Click on the Submit box to process the file.

Filter from  to

File Name	Date/Time Uploaded	User	Org Feed Code	Data Source	Status	Submit	
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20130523_001_RPTTest.csv</a>	04-Jun-2013 06:46	melliott	FTCCPCFC	CARTRPLUS	Pending	<input type="checkbox"/>	 
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20130402_002_RPTTest.csv</a>	09-Apr-2013 16:10	melliott	FTCCPCFC	CARTRPLUS	Processed with Errors	<input checked="" type="checkbox"/>	 
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20130402_001_RPTTest.csv</a>	09-Apr-2013 16:08	melliott	FTCCPCFC	CARTRPLUS	Reprocessed Errors	<input checked="" type="checkbox"/>	 

# Batch Upload Menu (cont.)

Batch Upload Detail report contains following tabs:

- Processing summary
  - # of records processed; # of records in error, match or link queue; # of cycles created
- Errors details
  - Details on normalization, initial cleansing, and UI validation errors
  - Chart # and visit id identifiers added for normalization errors
- Match queue and Link queue
  - Details on records in match and link queue
- Record log
  - Summary status of all processed records. For information purposes only

Batch Upload Details Report		
Organization: Markham Fertility Centre File: BORN_FTCMRKHM_CARTRPLUS_T_20130530_002_IVFFET_mandatory.csv Processed on: 31-May-2013 7:19 AM		
Record Outcome	# of records	Description
# of records in upload file	10	# of records in hospital upload file
# of records processed with no upload errors	1	Patient demographics and submitted encounter(s) created or updated.
# of records in normalization queue	2	Record rejected. No patient or encounters created.
# of records in queue management		
Initial Cleansing	5	Patient demographics created. No encounters created.
UI Validation	2	Patient demographics and draft encounter(s) created or updated.
# of records with cycles created	3	Submitted or draft cycle created or updated.
# of records in Match Queue	0	# of maternal patients in Match Queue
# of records in Link Queue	0	# of maternal patients in Link Queue
Go to additional tabs to investigate errors Error details: Details on normalization, initial cleansing, and UI validation errors Match queue: Details on patients in Match Queue Link queue: Details on records in Link queue Record log: Summary status of all processed records. Provided for informational purposes only.		

# Batch Upload Menu (cont.)

- Normalization Error Queue screen remains in the same location

**Quick Links**

- Patient Search
- **Batch Upload**
- Process Upload File
- **Normalization Error Queue**
- Cleansing Error Queue
- Data Quality Reports
- Reporting
- Acknowledgement
- Administration
- My Profile

### Normalization Error Queue

Records in the normalization queue will not clear automatically. Once the corrected record is re-uploaded, please delete the normalization file with the error via the red 'Remove' button.

Filter from  to  **Filter**

File Name	Date/Time Uploaded	User	Org Feed Code	Data Source	Total Records	# Invalid	Error Report	Error File
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20130402_001_RPTTest.csv</a>	09-Apr-2013 16:08	melliott	FTCCPCFC	CARTRPLUS	7	1		
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20130115_011_numeric.csv</a>	15-Jan-2013 14:01	melliott	FTCCPCFC	CARTRPLUS	40	13		
<a href="#">BORN_FTCCPCFC_CARTRPLUS_T_20121213_004_3237b.csv</a>	15-Jan-2013 13:55	melliott	FTCCPCFC	CARTRPLUS	12	2		

## Additional Changes

- New comment added to screen as reminder for file clean-up
- New normalization identifiers added to Normalization Error Report and the Error tab in the Batch Upload Details report

### Error Report

The file: BORN\_FTCCPCFC\_CARTRPLUS\_T\_20130402\_001\_RPTTest.csv had errors in the following lines:

Line 2: (Error #600) The 'TRIGGERMEDICATION' element - Data format(length) is invalid.  
Identifiers: MaternalChart#: **P4211**, CycleID: **436**, Cycle type: **IVF**

# Batch Upload Menu (cont.)

- Previous Queue Management screen moved to 'Cleansing Error Queue'

BORN UAT Portal > Batch Upload > Cleansing Error Queue

Quick Links

- Patient Search
- **Batch Upload**
- Process Upload File
- Normalization Error Queue
- **Cleansing Error Queue**
- Data Quality Reports
- Reporting
- Acknowledgement

Cleansing Error Queue

Filter from dd-MMM-yyyy to dd-MMM-yyyy **Filter**

# Invalid Records	File Name	Date/Time Uploaded	Date Processed	User	Org Feed Code	Data Source
2	BORN_FTCPFC_CARTRPLUS_T_20130402_002_RPTTest.csv	09-Apr-2013 16:10	09-Apr-2013	BORNUAT\meiliott	FTCPFC	CARTRPLUS
1	BORN_FTCPFC_CARTRPLUS_T_20130220_001_fetmissingpri.csv	20-Feb-2013 23:54	20-Feb-2013	BORNUAT\meiliott	FTCPFC	CARTRPLUS

## Additional Change

Batch upload users will no longer have the ability to delete error files from the Cleansing Error Queue

- Cleansing errors are automatically removed once errors are corrected or when the patient's record is uploaded in a more recent upload file
- If an error file needs to be deleted (e.g., if the patient's record should not have been included in the upload), contact the BORN help desk ([helpdesk@bornontario.ca](mailto:helpdesk@bornontario.ca)) with the filename in question and request deletion



# Menu Order

- The order of menu options on the top menu and the Quick Links bar has been updated

The screenshot displays the BORN UAT Portal interface. At the top left is the BORN Ontario logo. At the top right, the text reads "Pacific Centre for Reproductive Medicine / Marlene A Elliott". A red box highlights the top navigation menu with the following items: Patient Search, Batch Upload, Data Quality Reports, Reporting, Acknowledgement, Administration, My Profile, Help, and Sign Out. Below the navigation bar, the breadcrumb "BORN UAT Portal > Patient Search" is visible. On the left side, a "Quick Links" sidebar is shown with a red box around its items: Patient Search, Batch Upload, Data Quality Reports, Reporting, Acknowledgement, Administration, My Profile, Help, Select Organization, and Sign Out. The main content area is titled "Patient Search" and contains the following text: "Please specify one or both of the following search criteria: - Chart # or Cycle ID # and/or - DOB". Below this text are two input fields: "Chart # or Cycle ID #:" followed by a text box, and "DOB:" followed by a date picker box labeled "dd-MMM-yyyy". At the bottom right of the main content area are "Search" and "Cancel" buttons.

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BORN Information System Enhancements

# DATA ACKNOWLEDGEMENT

# Data Acknowledgement


- Support for acknowledging multiple months
  - If a user selects multiple months to acknowledge and acknowledgement is successful for some months but not others:
    - Green success messages will appear for the acknowledged months and acknowledgement completed for those specific months
    - Red error messages for the failed months will appear as per existing functionality and acknowledgement will not be completed for those specific months

### Data Submission Acknowledgement


Organization: **Pacific Centre for Reproductive Medicine**

Data Submission Type: **Treatment Cycle** Year: **2013**

Show all unacknowledged records

 **Month End Acknowledgement Updated**

- You have Successfully acknowledged Labour, Birth and Postpartum for February-2013.

 **The following errors occurred while processing your request**

- Labour, Birth and Postpartum cannot be submitted for the month of January-2013 because there are records with draft status.

Year	Month	Data Submission Type	Data Submission	Comments
2013	January	ART Treatment Cycle	<input checked="" type="checkbox"/>	<input type="text"/> <a href="#">Cycles</a>
2013	February	ART Treatment Cycle	<input checked="" type="checkbox"/>	<input type="text"/> <a href="#">Cycles</a>
2013	March	ART Treatment Cycle	<input type="checkbox"/>	<input type="text"/> <a href="#">Cycles</a>

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BORN Information System Enhancements

# DATA ELEMENT CHANGES

# # of US Fetal Sacs

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- # of US Fetal Sacs
  - Change to validation logic with respect to Biochemical Pregnancies
  - Updated logic:
    - Must have a value if Type of Pregnancy = Clinical Intrauterine
    - Must have a value if Type of Pregnancy = Heterotopic
    - Must have a value if Type of Pregnancy = Molar Pregnancy
    - Must have a value if Type of Pregnancy = Ectopic
    - **N/A if Type of Pregnancy = Biochemical**, Not Pregnant or Unknown

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BORN Information System Enhancements

# CARTR PLUS DATA QUALITY REPORTS

# Incomplete Treatment Cycle Record Report

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- The Incomplete Treatment Cycle Record report was updated to include summary counts and details of patients in Match Queue
  - The match queue only relates to Ontario records being entered via the batch upload functionality
  - Patients are put in match queue if the incoming patient record has sufficient demographics information in common with an existing BORN patient to be a potential match. For example, a patient has the same OHIP # and first name as an existing patient in BORN but the new record has a different address and last name
  - Manual intervention to resolve the match will be performed by a BORN agent to determine if this a new patient or a match to an existing patient

# Incomplete Treatment Cycle Record Report (cont.)

- On the summary tab, counts of the patients in the match queue are now displayed (Ontario upload clinics only)

Incomplete ART Treatment Cycle Report				
<b>ART cycle summary</b>				
ON IDEAS clinic, cycle starts from 01-Jan-2011 to 04-Jun-2013				
Cycle start date	# of total cycles started	# of cycles with error(s)	# of cycles with positive beta-hCG missing type of pregnancy	# of patients in match queue
2013	2	1	0	1
<i>Data source</i> BORN Ontario, 2011-2013				

- A new tab has been added providing details on the patients in the match queue

Incomplete ART Treatment Cycle Report							
<b>Match queue details</b>							
Organization	Batch File Name	Line # in file	Patient type	Patient ID #	Patient given name	Patient family name	
ON IDEAS clinic	BORN_FTCIDEASON_CARTRPLUS_T_20130521_003_me1.csv	1	Mother	PID2000	Charlotte	TEST	
<i>Data source</i> BORN Ontario							



# Queue Management Error Detail Report

- A new Queue Management Error Detail report has been created to list all errors currently in the Cleansing Error Queue
- Report is located under:  
Reporting - Administrative Reports - Batch Upload, Linking and Matching Reports

Enter Start and End date range and view report

A list of all current cleansing queue errors will be displayed with their associated batch file

**Queue Management Error Detail**

File Upload Start Date: 5/1/2013 File Upload End Date: 5/31/2013 View Report

Organization: Hamilton Health Sciences - MUMC

1 of 1 100% Find | Next

### Queue Management Error Detail Report

Organization: Hamilton Health Sciences - MUMC  
File Upload Start Date: 1-May-2013  
File Upload End Date: 31-May-2013

**Summary**

Initial Cleansing	2
UI Validation	2

**Details**

Batch File Name	Line #	Visit ID #	Chart #	Last Name	First Name	Error Type	Error Message
BORN_HOSPHHS_HOSPM_T_20130521_006_enhrpt.csv	3	V_EnhCCC	Ch_EnhCCC	InitCleans	InCleans	Initial Cleansing Errors	Type Of Conception (ERR001) - Code value is not found
BORN_HOSPHHS_HOSPM_T_20130521_006_enhrpt.csv	4	V_EnhDDD	Ch_EnhDDD	NoLabour	Labonly	UI Validation Errors	Birth Encounter - Please ensure Labour encounter is entered first!
BORN_HOSPHHS_HOSPM_T_20130523_001_demo.csv	3	VISITID_CCC	Ch_CCC	Charles	Test	Initial Cleansing Errors	Type Of Conception (ERR001) - Code value is not found
BORN_HOSPHHS_HOSPM_T_20130523_001_demo.csv	4	VISITID_DDD	Ch_DDD	Dillinger	Test	UI Validation Errors	Birth Encounter - Please ensure Labour encounter is entered first!

Data source: BORN Ontario, 2013

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BORN Information System Enhancements

# MOVE AND DELETE CYCLES

# Move and Delete Cycles

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- Users with the Local Administration role will now be able to move cycles between patients as well as delete cycles and patients
- Users will only be able to move and delete cycles belonging to their organization


# Move Cycle

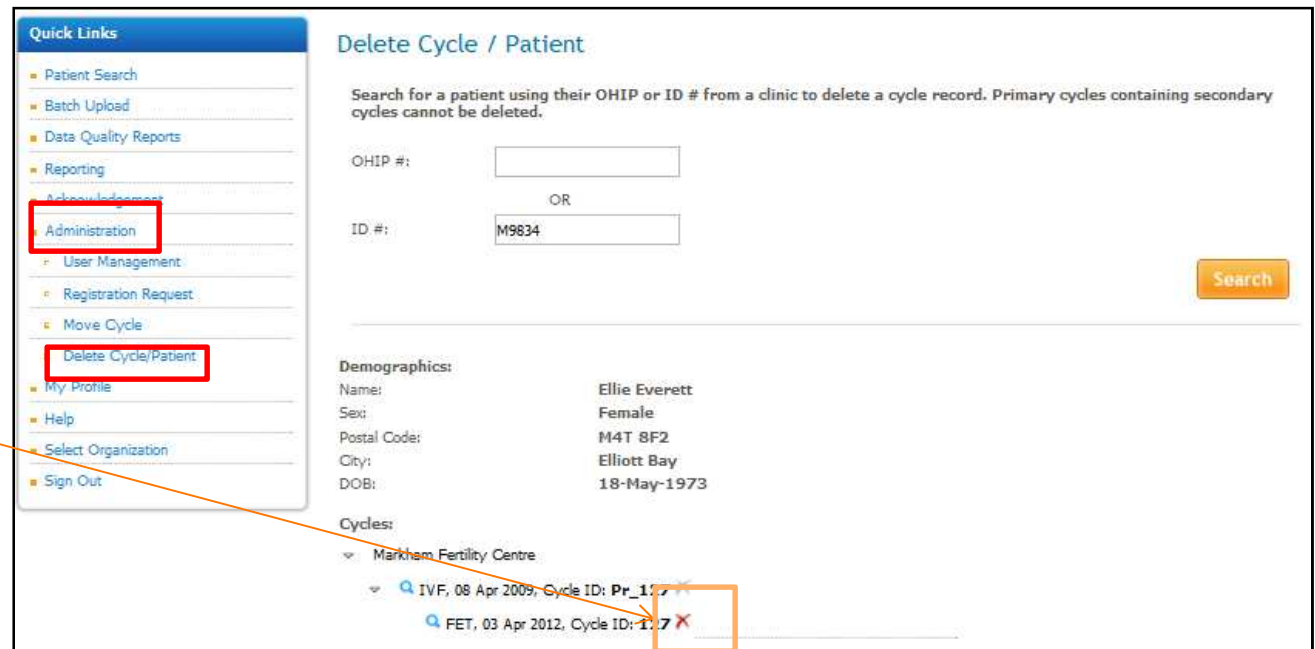
- The Move Cycle function allows a user to move cycles from one patient to another in case a cycle has been inadvertently assigned to the wrong patient
- Found under Administration – Move Cycle

1. Enter Cycle ID, Chart number, or Health Card Number for originating patient and select 'Search'
2. Enter Cycle ID, Chart number, or Health Card Number for destination patient and select 'Search'
3. Select cycle from originating patient to be moved to destination patient
4. Select 'Move Cycle(s)' to move cycle

# Delete Cycle

- The Delete Cycle function allows a user to delete cycles created in error
- If a patient has a primary cycle linked to a secondary cycle, the secondary cycle must be deleted first
- Users do not have the ability to delete patients. This function can only be done by a BORN administrator
- Found under Administration – Delete Cycle / Patient

1. Enter Cycle ID, Chart number, or Health Card Number for originating patient and select 'Search'
2. Select  to delete cycle. If secondary cycle exists, delete button not enabled for primary cycle. Once secondary cycle deleted, delete button will be enabled for primary cycle



**Quick Links**

- Patient Search
- Batch Upload
- Data Quality Reports
- Reporting
- Acknowledgement
- Administration
- User Management
- Registration Request
- Move Cycle
- My Profile
- Help
- Select Organization
- Sign Out

### Delete Cycle / Patient

Search for a patient using their OHIP or ID # from a clinic to delete a cycle record. Primary cycles containing secondary cycles cannot be deleted.

OHIP #:


OR

ID #:

**Demographics:**

Name:	Ellie Everett
Sex:	Female
Postal Code:	M4T 8F2
City:	Elliott Bay
DOB:	18-May-1973

**Cycles:**

- ▼ Markham Fertility Centre
  - ▼ IVF, 08 Apr 2009, Cycle ID: Pr\_117
  - ▼ FET, 03 Apr 2012, Cycle ID: 117 

# Questions?

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Please contact Moya Johnson  
([mojohnson@bornontario.ca](mailto:mojohnson@bornontario.ca))  
or Marlene Elliott  
([melliott@bornontario.ca](mailto:melliott@bornontario.ca))  
if you have any questions

[www.BORNOntario.ca](http://www.BORNOntario.ca)  
info@BORNOntario.caM