

SHOEBOX



AUDIOMETRY

Data Management,
Data Management PLUS
User Guide

Table of Contents

Introduction	3
SHOEBOX Data Management and Data Management PLUS (DM+) for Individual Users	4
Portal Login	4
Working With Your Data	5
Manually Importing Audiograms	6
Managing Patients	7
Editing Patient Information	7
Sorting and Displaying Patient Lists	7
Filtering and Searching Patient Lists	8
SHOEBOX Data Management PLUS for Administrators	9
Managing Users	10
Sharing Data	10
Managing Patients	11
Adding New Patients	11
Projects	12
Adding Users	12
Importing Existing Data	13
Exporting Data	14
Test Result Data	14
Viewing & Generating Results and Reports	15
Patient Reports	15
Project Reports	16
Select your report type	16
Billing	19
General Configurations	20
Audiogram Display Options	20
Analysis	20
Reports Configurations	21
QuickTest Configurations	22
Symbols Legend: 5.0	23
Symbols Legend: 4.x	25

SHOEBOX is manufactured by
Clearwater Clinical Ltd.
Suite 301, 80 Aberdeen St
Ottawa, ON, Canada K1S 5R5
www.clearwaterclinical.com
1-877-349-9934

SB-QMS-727 Rev: N / 2018-08

Introduction

Thank you for choosing SHOEBBOX Audiometry. SHOEBBOX Data Management is a secure cloud-based web portal for data storage and analysis. It offers a quick and convenient way to back-up, and archive information—including the patient and audiogram information captured on the iPad. Log in to the web portal to access and manage the data from your browser.

SHOEBBOX Data Management and Data Management PLUS (DM+) allow for complete management of data collected across one or a multitude of SHOEBBOX devices. A summary of the functionality available with each solution is found in the table below:

Data Management	Data Management Plus (DM+)
Web portal accessible from browser	Web portal accessible from browser
Automatic back-up from the iPad(s)	Automatic back-up from the iPad(s)
Secure, HIPAA-compliant storage services	Secure, HIPAA-compliant storage services
Centrally view the patient/employee data & results synced from the SHOEBBOX iPad device in one complete list	Centrally view the patient / employee data & results synced from the SHOEBBOX iPad device(s) in logical groupings (geographies, organizations)
Flexible search and filter capabilities for viewing data	Flexible search and filter capabilities for viewing data
Electronic data transfer/export of patient test results	Electronic data transfer/export of patient test results
	Easy import of patient lists from external sources for download to single or multiple SHOEBBOX iPad devices
	Easy import of historical audiograms, including baselines
	Organize data on the portal into projects then synchronize patient lists to the iPads
	Define and maintain audiometric baselines for each patient
	Monitoring for threshold shifts for a variety of different regulations/standards
	Comprehensive reports including: <ul style="list-style-type: none"> • Individual patient summary reports • Clinical hearing threshold shift reports (CTCAE) • Employee/patient roster reports • Hearing conservation shift reports • BROCK classification grade reports • Pure Tone Average (PTA) reports • Batched ZIP reports
	Administrative control for assigning user access across projects

SHOEBOX Data Management and Data Management PLUS (DM+) for Individual Users

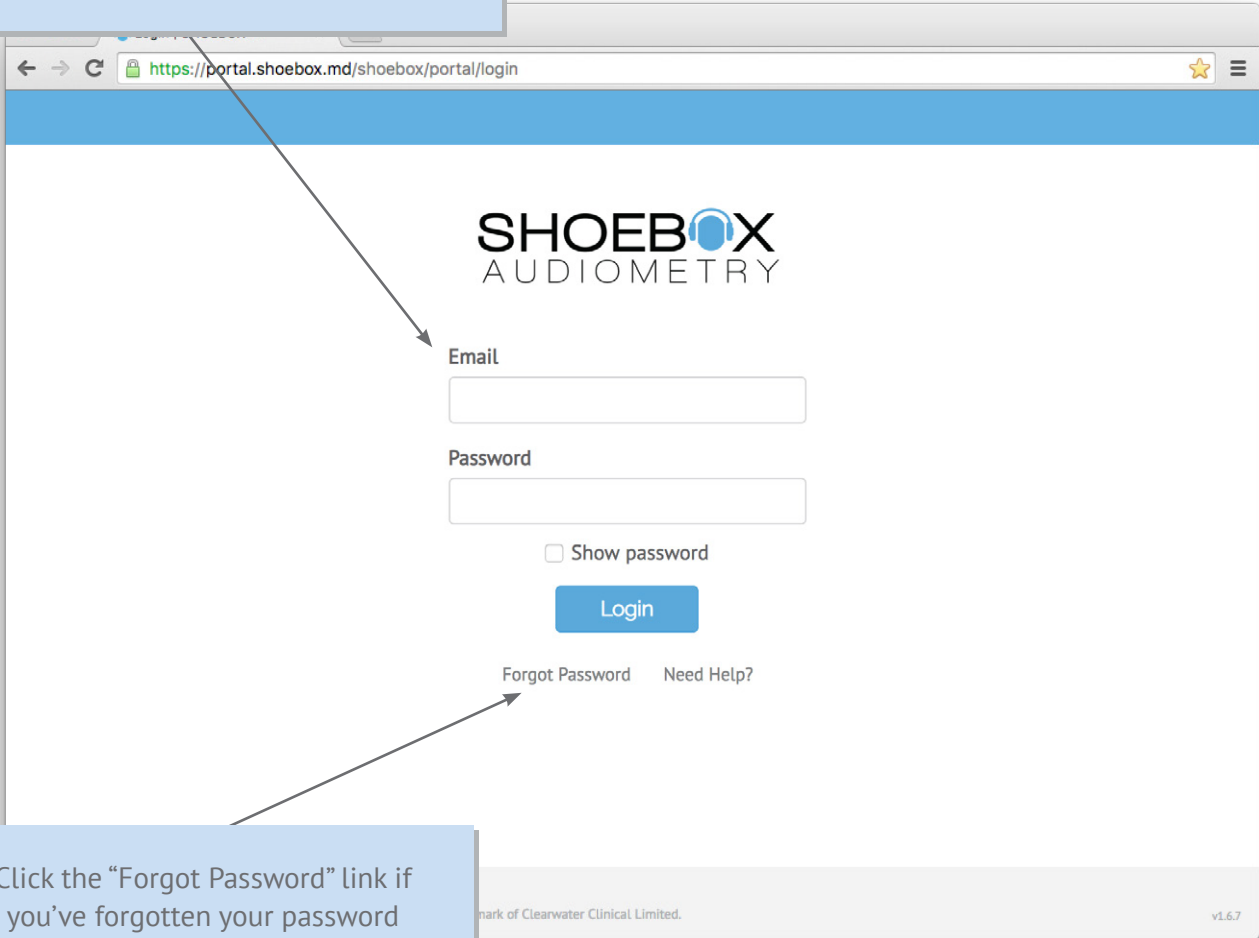
Portal Login

You can access your data online using the SHOEBOX Data Management web portal at <https://portal.shoebox.md>. Simply enter your credentials when prompted and that's it!

Missing Credentials?

You will have been given login credentials by a SHOEBOX Audiometry team member in an email and asked to create your own password. If you've forgotten your password, select the "Forgot Password" link on the login screen and you'll receive an email with directions on how to reset your password. Doing this will change your SHOEBOX iPad software login password as well.

Enter email and password then click "Login" to get started!



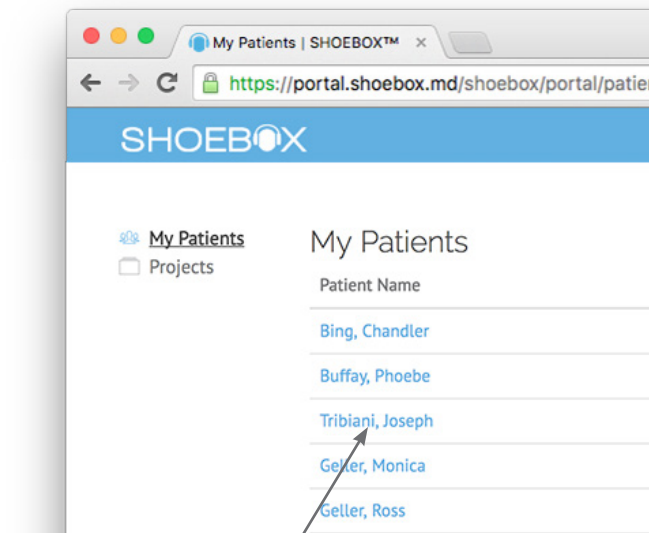
Click the "Forgot Password" link if you've forgotten your password

Working With Your Data

From the SHOEBOX Data Management web portal, you can view and download patient test results that have been uploaded from the SHOEBOX iPad. The 'My Patients' section will list all patients that you have created from your SHOEBOX iPad device. With DM+, administrators will also see "All Patients" which lists all patients that have been created by members of your organization, and base users will see the "Projects" section which will list all of the projects for which they have been granted access by the administrator.

To view a patient's data, click the patient's name in the list. The Audiogram History will display in a grid under the patient demographics. With DM+, you can set the baseline in the audiogram summary by selecting the box in the LB or RB column of the test you wish to set as baseline. The documents section contains all test results in reverse chronological order. View any test result by clicking on the item. Audiogram test results will be downloaded as a PDF, and all others will be displayed as web-only viewing.

To return to the patient list, click the 'My Patients' or 'All Patients' option in the left side menu.



1 Click to select patient you'd like to view data for.

Did You Know?
You can also view an audiogram by clicking on the respective row in the Audiogram History table.

2 Click to mark audiogram as a baseline (DM+)

3 Click to view, download, or delete audiogram

Date		Time	LB	Left Thresholds (dB HL)								RB	Right Thresholds (dB HL)								AHL (2K, 3K, 4K)			
				500	1K	2K	3K	4K	6K	8K					500	1K	2K	3K	4K	6K	8K	Left	Right	
2017-12-11	05:00	<input type="checkbox"/>	15	20	25	25	30	35	40	<input type="checkbox"/>	10	15	20	30	35	40	45	26.6	28.3	...				
2002-09-20	04:00	<input type="checkbox"/>	10	10	10	10	15	15	20	<input type="checkbox"/>	10	15	20	25	30	35	40	11.6	25.0					
1992-06-18	04:00	<input checked="" type="checkbox"/>	10	10	10	10	10	10	10	<input checked="" type="checkbox"/>	10	10	10	15	20	25	30	10.0	15.0					

- View
- Delete
- Download

Manually Importing Audiograms

With DM+, you can manually import historical patient audiograms from an individual patient page. Click the “New Audiogram” button in the “Audiogram Summary” section to manually add an audiogram. A dialog window will appear with all necessary fields for adding historical audiogram data.

For each frequency, you can input a number to indicate a threshold (e.g. 70) or a number+ to indicate a no response (e.g. 90+). Simply leave any untested frequencies blank.

When you’re done adding patient audiogram data, click “Save.”

The audiogram will now display in the “Audiogram Summary” section and appear in the “Documents” section, labeled as “Audiogram: Imported.”

A number indicates a threshold, while a number+ indicates no response

New Audiogram

Test Date: 2017-09-21

Test Time: 12:30 pm

Examiner:

Transducer Model:

Transducer Serial:

Audiometer Model:

Audiometer Serial:

Calibration Date: 2017-09-20

Include Extended High Frequencies

Air

Right Ear

Frequency:	250Hz	500Hz	750Hz	1000Hz	1500Hz	2000Hz	3000Hz	4000Hz	6000Hz	8000Hz
Threshold (dB):	20	35	30	25	40	45	60	55	70+	70+

Notes:

Mark as Baseline

Left Ear

Frequency:	250Hz	500Hz	750Hz	1000Hz	1500Hz	2000Hz	3000Hz	4000Hz	6000Hz	8000Hz
Threshold (dB):	20	30	40	30	40	35	55	50	60	70+

Notes:

Mark as Baseline

Managing Patients


Editing Patient Information

To edit patient information, click on the patient name to go to the individual patient page. Click the “Edit” icon in the top right corner of the “Patient Demographics” section to edit patient information.

When you’re done editing patient information, click the “Save” button to save your changes.

Sorting and Displaying Patient Lists

You can sort and change the display of the patient lists on the “My Patients” or “All Patients” pages.


Use the “Settings” icon  to open the column display options. You can add or remove columns or change the order they appear. You can display

Did You Know?

You can synchronize patients lists or updated demographics back to the SHOEBOX device(s) by organizing your patients into projects, available with DM+.

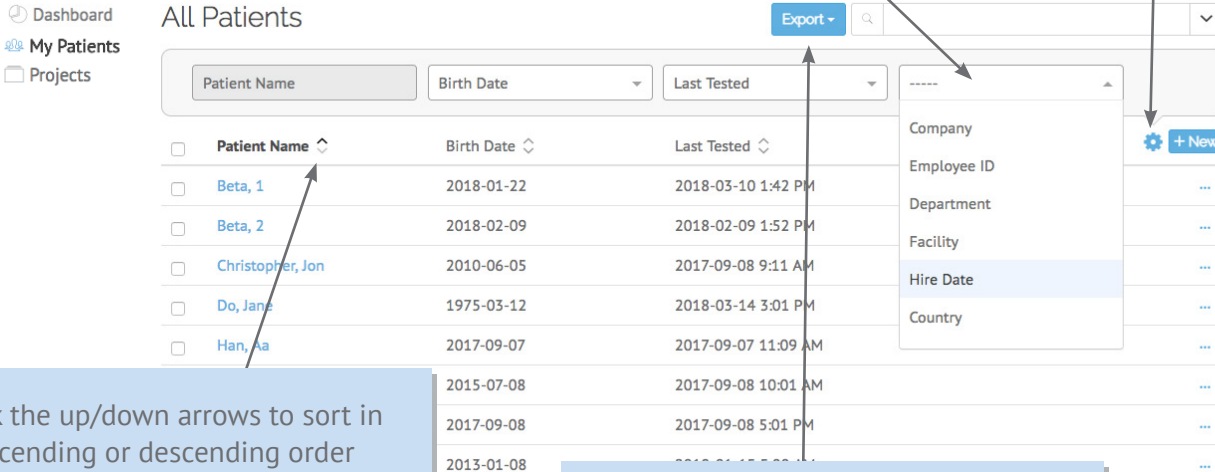
up to four columns of data.

“Patient Name” will always be displayed, but the remaining three columns are configurable. Click the drop down menu to choose what patient data you want to display in the corresponding column. When you’ve finished configuring the display, click the “Settings” icon to close the settings.

You can also sort the patient list by any of the four columns by selecting the  beside the column header.

Click the “Settings” icon to open or close the column configuration

Select from the drop down to configure a column



The screenshot shows the 'All Patients' page with a table of patient data. The table has columns for Patient Name, Birth Date, and Last Tested. A dropdown menu is open for the 'Last Tested' column, showing options like Company, Employee ID, Department, Facility, Hire Date, and Country. A settings gear icon is visible in the top right of the table area. Callouts provide instructions on how to use these features.

Patient Name	Birth Date	Last Tested
<input type="checkbox"/> Patient Name	Birth Date	Last Tested
<input type="checkbox"/> Beta, 1	2018-01-22	2018-03-10 1:42 PM
<input type="checkbox"/> Beta, 2	2018-02-09	2018-02-09 1:52 PM
<input type="checkbox"/> Christopher, Jon	2010-06-05	2017-09-08 9:11 AM
<input type="checkbox"/> Do, Jane	1975-03-12	2018-03-14 3:01 PM
<input type="checkbox"/> Han, Aa	2017-09-07	2017-09-07 11:09 AM
	2015-07-08	2017-09-08 10:01 AM
	2017-09-08	2017-09-08 5:01 PM
	2013-01-08	

Click the up/down arrows to sort in ascending or descending order

Click the “Export” button to export patient and result data.

Filtering and Searching Patient Lists

You can filter the list of patients displayed in the Patients Lists based on criteria such as Project or Date Range by selecting the down arrow beside the search bar and specifying the Project and/or date range

You can also search for a specific patient by typing their name in the search box on the upper right hand side of the My Patients or All Patients page.

Did You Know?

You can clear this search criteria by clicking the search criteria item located at the top of the patient list screen.

Logout

When you're finished, use the "Logout" button on the top right side of the screen.









The screenshot shows the SHOEBBOX 'My Patients' page. A search bar at the top right contains 'CWC Testing'. A dropdown menu is open below the search bar, showing 'Project: CWC Testing' and 'Date Range: Last Month (Not set)'. A callout box above the search bar says 'Enter patient name or use down arrow to select a project or date range'. Another callout box below the search bar says 'Click to remove patient name search criteria.' The patient list table below has columns for Patient Name, Birth Date, and Gender. The first two rows are 'Cwc, Floor3' and 'Cwc, Floor5'. A '15 per page' dropdown is at the bottom left of the table.


<input type="checkbox"/>	Patient Name ↑	Birth Date	Gender
<input type="checkbox"/>	Cwc, Floor3	2018-03-28	Female
<input type="checkbox"/>	Cwc, Floor5	1973-04-05	Male

SHOEBOX Data Management PLUS for Administrators

With Data Management PLUS, the capabilities listed in this section are available for the administrator user. Administrators also have access to the features described in the 'Individual Users' section of this manual.

The menu section available for the administrator includes the following key functions:

-  **Dashboard**
-  **My Patients**
-  **All Patients**
-  **Projects**
-  **Reports**
-  **Data Admin**
-  **Users**
-  **Billing**

-  **Configurations**
 - General*
 - Reports*
 - QuickTest*

Dashboard

Provides a dashboard view of hearing loss cases, patients tested, and test locations

My Patients

List, manage, and review patients and their associated results created by you

All Patients

List, manage, and review all patients and their associated results where you have been given

access (through projects)

Projects

Manage projects, and import patient and audiogram from external systems

Reports

Run and retrieve reports

Data Admin

View past data import activities

Users

Create and manage users

Billing

If you are the billing user, this is where you manage your account billing details

Configurations

General

Set system configurations for default audiogram displays (audiogram/table view, enabling the hearing loss grades or speech banana overlays), averaging calculations and shift/grade calculations.

Reports

Set report configurations including report header and logo, patient demographics selections, and which components you wish to include in your patient summary reports

QuickTest

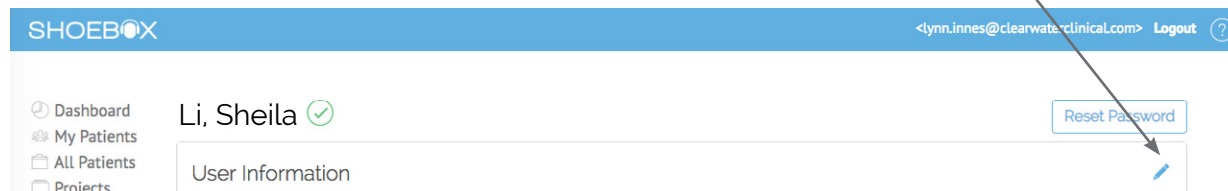
Configure QuickTest settings: frequencies to be tested, tone levels, and welcome screen

Managing Users

All users in your organization will be listed in the “Users” section. From here, you can create new users by clicking the “New” button, and view existing users by clicking on their user name.

To edit users, select the user you wish to edit and click the pencil icon (top right corner).

Click the “pencil” icon to edit the user



From the individual user page, you can perform various actions relating to user status: disabling a user, sending a password reset email, resending a verification email (if the password has not yet been set), unlocking a user, and enabling a disabled user. You can also edit a user’s first and last name.

Need New Users?

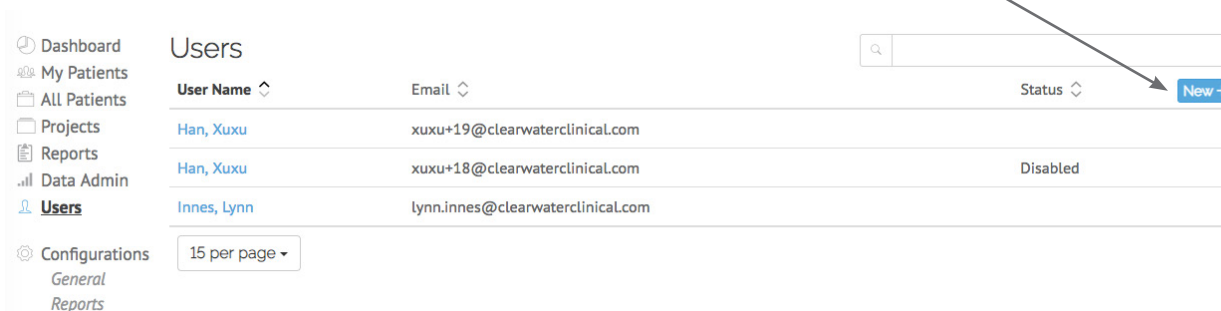
In order for a member of your organization to log in and use their SHOEBOX Audiometer they must first have a user account.

To add new users to your organization, click the “New” button on the Users page. The number of users you can add to your organization depends on your number of SHOEBOX licenses. Contact support@shoebox.md if you need to add more licenses.

Sharing Data

By default, all non-admin users are only able to view patients and test results that they have created. If you would like to provide users with the ability to view test results and patients created by other members of your organization, contact support@shoebox.md for configuration assistance.

Click the “New” button to add new users

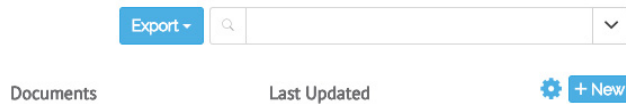


Managing Patients

In addition to the standard data management functionality available to all users (see 'Individual Users' section), administrative users are able to add/delete patients and change their associated project.

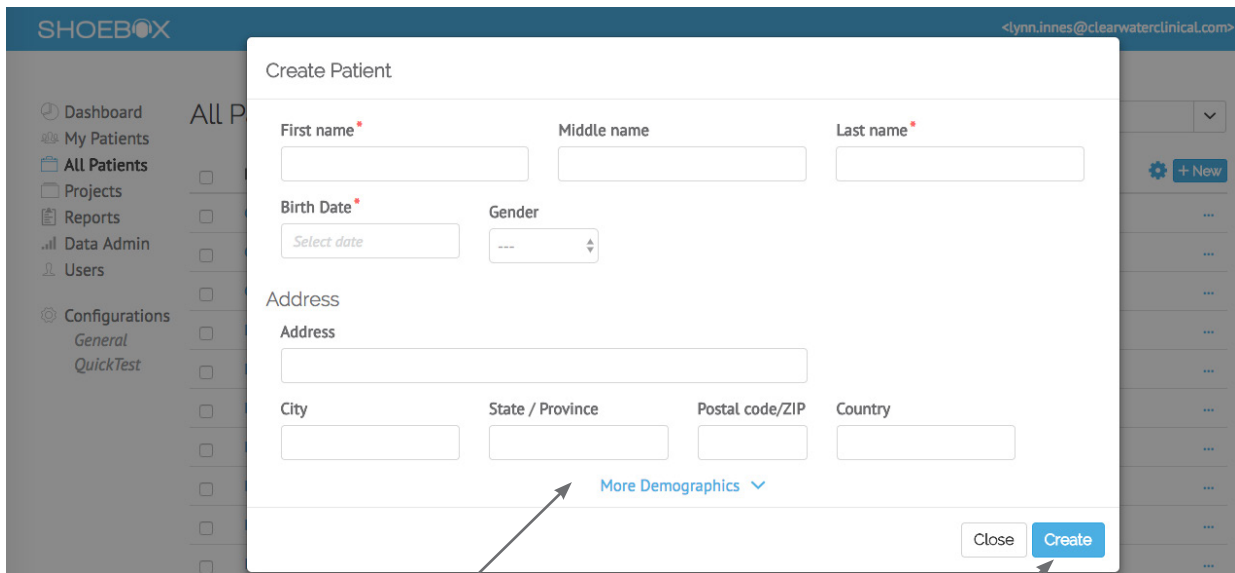
Adding New Patients

With DM+, you can add a new patient, by clicking the "New" button on the My Patients or All Patients page. A pop up dialog will appear with inputs for all available patient demographics. Required fields are marked with an "*".



When you are done adding patient information, click "Create" to create your patient.

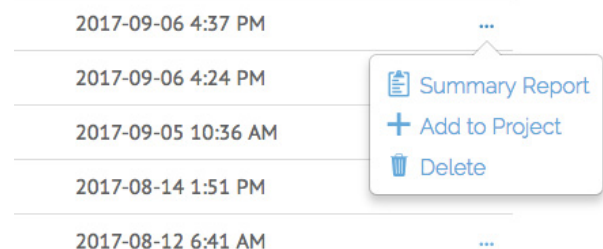
Click the "New" button to create a new patient



Access more input fields by clicking "More Demographics"

After adding patient information in the pop up dialog, click "Create" to save the information

From the patient list, you can open the action menu at the right of the patient item to access options such as generating a summary report, deleting, and assign the patient to a project. To complete these actions for a group of patients, simply use the checkbox beside the patient name(s) to select multiple patients before selecting the action from the action menu.



Projects

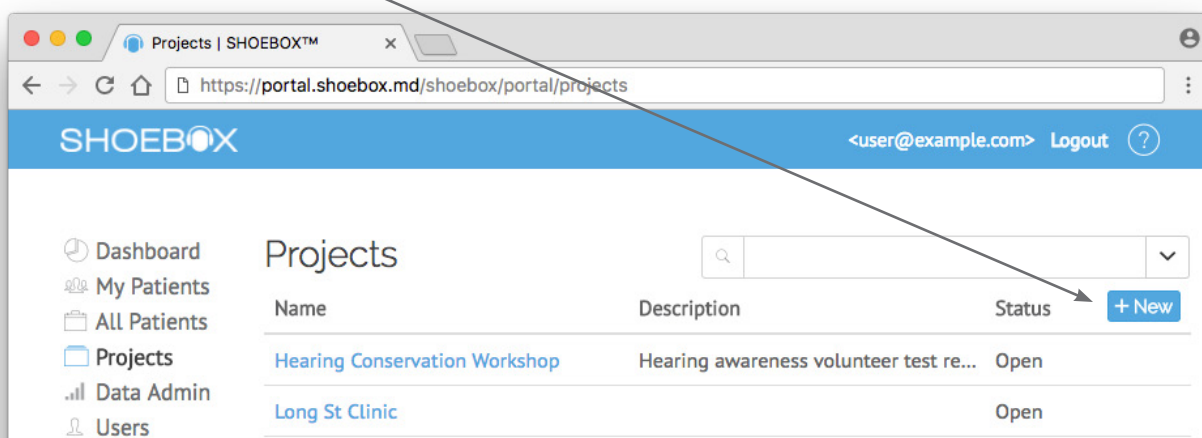
The “Projects” section gives you the ability to organize your patients and data into relevant groups. To create a new project, select the “+ New” button at the top of the screen and fill in the information requested. The start and end dates can be estimates and are not enforced.

Click the “+ New” button to create a new project

Tips For Creating Projects

Projects can help you organize your patients and test results into logical groups. How you choose to group your data will depend on your organization’s needs, but some suggestions include:

Clinic Locations
Patient Demographics
Patient Referral Status
Special Events



Adding Users

When you create a new project, you will automatically be added to the project as the first user. You will then be prompted to add additional users. Users who are part of a project are able to access the project patients on the SHOEBBOX iPad. These users are also able to add data to the project from the SHOEBBOX iPad by creating and uploading additional patients and test results.

To add new users, simply select those you wish to add from the list of users in your organization, and click “Add” when you’re done.

Add Users to Project

User Name	Email
<input checked="" type="checkbox"/> Seinfeld, Jerry	jerry.seinfeld@organization.com
<input checked="" type="checkbox"/> Benes, Elaine	elaine.benes@organization.com
<input type="checkbox"/> Costanza, George	george.costanza@organization.com
<input type="checkbox"/> Kramer, Cosmo	cosmo.kramer@organization.com

Cancel Add

Importing Existing Data

If you would like to import patients or audiograms from an existing system, you can do so by opening the project you wish to put them in, clicking the + icon to open the upload window or dragging a properly formatted CSV file onto the project import box. Files must be less than 10MB and conform to the SHOEBOX CSV formatting guidelines

⊕ Import Patients and Audiograms

Drop a CSV file here to import either patients or audiograms.

Your current date format setting is MMDDYY ([Change Date Format](#))

Change Date Format

Ensure the date format matches the date format in your CSV file. You can change the import date format by clicking the “Change Date Format” link prior to selecting your CSV file.

Please visit www.shoebox.md/support/shoebox-data-management to access the Data Import Reference guide for full details on importing data and to download a template csv file.

Patients or audiograms added this way will automatically be added to the corresponding project, and patients will be transferred to the iPads of any user you have added to the project. At any point, you can add or remove patients from the project and these changes will once again be transferred to the iPads when connected to WiFi.

Closing Projects

Closing a project you are no longer using is a good way to declutter your main projects view. To close a project, click on the project name to go to the individual project page. Click the “Edit” icon in the top right corner of the “Project Details” section, and change the project status to “Closed.” Click the “Save” button to save your changes.

By default, only open projects are shown in the main projects view, but you can still access a closed project. If you need to view or re-open a closed project, click the drop down in the search bar and select the “Closed” status option. On the SHOEBOX iPad, users are still able to access and upload data to closed projects.

Long St Clinic Export ▾

Project Details Cancel Save

Name *

Long St Clinic

Description

Start Date End Date

Select date Select date

Status

Closed

Exporting Data

Export ▾

Test Result Data

Test results in the user portal can be exported as a ZIP file that contains the summary report for each of the patients listed, as well as a single .csv file containing all results of the selected test type. These test results can be exported from the All Patients, and My Patients sections, as well as from an individual Project page. The export action is for the collection of patients or projects based on the search/filter criteria, however it is not affected by patient selections.

ZIP Individual Summary Reports ZIP

This option generates a ZIP file containing a summary report for each patient.

CSV Speech Discrim Results

This option generates a CSV file containing all speech discrimination results for the patients listed.

CSV Audiograms

The option generates a CSV file containing all patient audiogram results for the patients listed.

CSV Patients List

This option generate a CSV file containing all patient and demographic data for the patients listed.

CSV SRT Results

This option generates a CSV file containing all Speech Reception Threshold (SRT) results for the patients listed.

CSV <name> QNR

This option generates a CSV file containing all responses for the specified questionnaire that was used on the SHOEBOX Audiometer. As an example, CSV HHIA-S QNR is the CSV export for the HHIA-S questionnaire.

CSV QuickTest Results

This option generates a CSV file containing all QuickTest results in the portal. This is only visible if you have a QuickTest license.

Click the "Export" button to export Test Result Data

The screenshot shows the 'All Patients' page with a table of patient data. The 'Export' button is highlighted, and a dropdown menu is open, listing various export options. A callout box points to the 'Export' button, and another callout box points to the 'More Actions' button (three dots) in the table.

Patient Name ↑	Birth Date	Last Updated
<input type="checkbox"/> Cwc, Floor3	2018-03-28	2018-04-09 4:36 PM
<input type="checkbox"/> Cwc, Floor5	1973-04-05	2018-04-05 11:11 AM
<input type="checkbox"/> CwcMay8a, Tester1a	1991-05-08	2018-05-08 9:17 AM
<input type="checkbox"/> Davidson, Sam	1959-01-14	2018-04-04 3:17 PM

Export ▾

- ZIP Individual Summary Reports
- CSV Speech Discrim Results
- CSV Audiograms
- CSV Patients List
- CSV QuickTest Results
- CSV SRT Results
- CSV HHIA-S QNR

Click a patient's "More Actions" button to create a summary report, add them to a project, or delete them.

Viewing & Generating Results and Reports

Patient Reports

To generate a summary report for a single patient, navigate to a single patient page and click the “Summary Report PDF” button, or select the “Summary Report PDF” option from the overflow menu in the patient lists.

Did You Know?

You can easily view the patient reports on your mobile device(s), and if you resize your window, you can see the left and right audiograms in a combined view.

The individual patient summary report includes the following information:

- Patient demographics
- Analysis, which includes questionnaire scores as well as any applicable shift calculations
- The most recent audiogram
- Audiogram history table
- The most recent speech results (speech discrim and SRT/SDT)
- The most recent questionnaires/inventories completed within 1 week of the most recent audiogram

Note: You can customize the demographics and report components from the “Configuration” page.

Create a summary report

Summary Report PDF

Edit

Click the “eye” icon to select alternate display options

Dashboard
My Patients
All Patients
Projects
Reports
Data Admin
Users
Configurations
General
Reports
QuickTest

Brubaker, Alexander

Patient Demographics

Last name: Brubaker
First name: Alexander
Birth Date: 1996-08-02
External ID:
More Demographics

Analysis

OSHA Standard Threshold Shift (2k, 3k, 4k) - with Age Adjustment
OSHA Recordable Shift (STS and 25dB min avg) - with Age Adjustment
Hearing status for speech range (0.5, 1.2, 3k Avg)
Hearing status for higher pitch sounds (4, 6, 8k Avg)

Audiogram: 2018-08-01

Left Ear Results: PTA: 15

Right Ear Results:

Display Options

View

- Individual Audiograms
- Table

Audiogram Overlays

- Hearing Loss Grades
- Speech Banana

Project Reports

From the “Reports” page, you can create, view, and download PDF reports based on project and patient data. Note that any customization of the reports is configured from the “Configurations” page.

Select your report type

Roster Report

This report generates a listing of *all people in the selected project(s)*, and includes data such as their name, date of birth, last test date and an indication of whether or not a significant shift occurred, or their Brock classification grade (if applicable).

Shift Report

This report generates a listing of only the people with shifts or non-zero classification

grades. The report lists data such as their name, date of birth, last test date, and their shift/classification grade. In addition, this report provides a summary of the number of people tested and the number of people who experienced a shift, or have a non-zero classification grade. Note that for OSHA reporting, this list includes all those who have an STS (whether it is recordable or not).

Recordable Shift Report

This report generates a listing of only the people with recordable shifts, as per OSHA regulations. The report lists data such as their name, date of birth, the project name, last test date, and their calculated shift. In addition, this report provides a summary of the number of people tested and the number of people who experienced a recordable shift.

The screenshot shows the 'Reports' page interface. At the top, a blue callout box says 'Select Report Type to enter Report details and run the report' with arrows pointing to three buttons: '+ Roster Report', '+ Standard Shift Report', and '+ Recordable Shift Report'. Below these is a 'Generated Reports' section with a warning: 'Reports will no longer be accessible after 30 days.' A table lists generated reports with columns for 'Report Title', 'Project', and 'Generated on'. A blue callout box at the bottom right says 'Click the download icon to download a report' with an arrow pointing to a download icon in the table. Another blue callout box on the right says 'Reports area where generated reports are stored for downloading' with an arrow pointing to the 'Generated Reports' section.

Report Title	Project	Generated on
Report	---	2018-05-16 10:55 PM
Cwc, Floor5 - Summary Report	---	2018-05-16 10:40 PM
OSHA, 10dBchange2k3k4kRightEarOnly - Summary Report	---	---
Summary Reports	---	---

Generating Reports

To run a report, follow the steps below from the “Reports” page:

1. From the “Build New Report”, select the report you would like to generate (Roster/Shift).
2. Enter the Filter Criteria where you can specify the following:
 - a. The project for which you want to run the report.
 - b. The date range. *Note: select “custom” from the list to specify your own date range.*
 - c. The calculation standard. *Note: the contents of this list will depend on your configuration.*

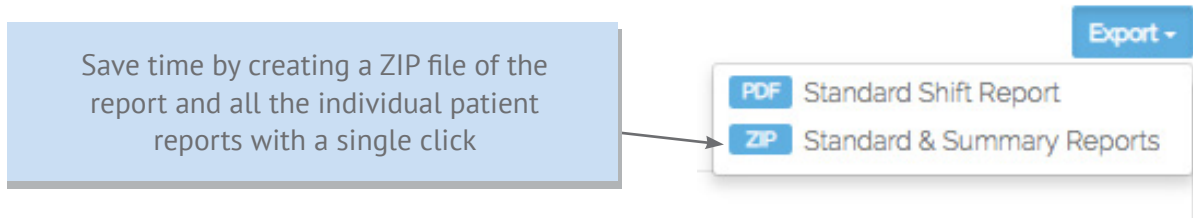
The screenshot shows the 'Shift Report' filter criteria form. It includes fields for 'Project' (set to 'Company LMN'), 'Date Range' (set to 'Last Month (Apr 01 to Apr 30)'), and 'Calculation Standard' (with a dropdown menu open showing options like OSHA, MSHA, CTCAE, Brock, and PTA). Callout boxes point to these fields with labels: 'Project selection', 'Date range', and 'Calculation Standard'. A separate box titled 'Did You Know?' contains the text: 'You can scroll down in the dropdowns to see more selection'.

3. Once you have filled in your filter criteria, select “Apply” to preview the report. Apply

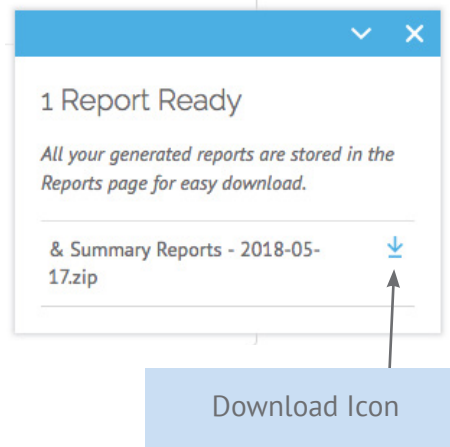
You are now be able to preview your report on the screen where you are provided a Summary of the results, as well as the list of patients and summary results.

The screenshot displays the report results. At the top is a 'Results Summary' box containing the following text: 'Summary', 'Total Employees Tested: 29', 'Employees with OSHA standard threshold shifts (age adjusted): 1', 'Threshold shifts are calculated using the frequencies: 2K, 3K, and 4K Hz', and 'Age adjustment has been applied according to OSHA standard specified in Appendix F of 29 C'. Below this is an 'Employee List' table with columns: Patient Name, Birth Date, Project, Last Test Date, Right STS, and Left STS. The first row shows 'Brubaker, Alexander' with birth date '1996-08-02', project 'Happiness Project', last test date '2018-08-01', right STS '11.6', and left STS empty. A '15 per page' dropdown is visible below the table. A callout box points to the table with the text: 'Click a patient to pull up their individual summary view, or use the action buttons'.

4. If you want to save the report, select “Export”, and select which report you would like to save:
 - a. The Standard Shift/Roster Report is a pdf file of the report seen on the screen.
 - b. The Standard Shift/Roster & Summary Reports is a ZIP file that contains the report you see on the screen as well as the pdf file for each of the patients listed in the report.



5. When your report is ready, you can download it in two ways:
 - a. Download it directly from the message window (right) by clicking the download icon
 - b. Go to the main Reports page (below), where the report will be listed in the “Generated Reports” section.



Note: When generating your report, you can continue other work in the portal and just go to the main Reports page to retrieve the report at a later time.

Generated Reports		
<i>Reports will no longer be accessible after 30 days.</i>		
Report Title	Project	Generated on
Home, Cmi15 - Summary Report	---	2018-05-23 4:18 PM

15 per page ▾

Billing

Only billing users have access to the billing page. This is where account billing details can be managed on an organizational basis.

Depending on whether your organization pays by invoice or credit card, you will see the following components:

Billing Address

Set / edit your billing address. This information is required for organizations paying by credit card before credit card information can be set.

Credit Card Information

Set / edit your credit card information. This will only be visible to organizations paying by credit card and is required to unlock the portal for your organization's users.

Billing Notifications

Here you'll find a list of all current billing users, as well as the ability to add an additional email to be cc'd on all billing related emails.

Billing History

Billing history and payment status. You can download past invoices by clicking the download icon.

The screenshot shows the SHOEBOX Billing page. At the top, there is a blue header with the SHOEBOX logo on the left and the user email 'user@email.com' with 'Logout' and a help icon on the right. A left sidebar contains navigation items: Dashboard, My Patients, All Patients, Projects, Reports, Data Admin, Users, Billing (highlighted with a dollar sign), and Configurations (with sub-items General and QuickTest). The main content area is titled 'Billing' and contains four sections: 1. 'Billing Address' showing 'Fancy Organization', '123 Real St', 'Ottawa, Ontario, K1Y 1B2', and 'Canada'. 2. 'Credit Card Information' showing a masked card number ending in '4242', 'Expires 11 / 23', and 'RICK FLAIR'. 3. 'Billing Notifications' with a note that 'Billing notifications include invoices and payment related notifications. Billing users receive billing notifications by default.' It lists 'Billing Users: user@email.com' and 'Send copies of notifications to: billing@notifications.com'. 4. 'Billing History' with a note 'Your next billing date is: 2018-06-01' and a table of past invoices.

Date	Number	Amount	Status	
2018-05-01	3002	\$310.00	Due	Download
2018-04-01	2709	\$310.00	Paid	Download
2018-03-01	2357	\$310.00	Void	Download
2018-02-01	1879	\$310.00	Paid	Download

General Configurations

The 'General' page is the area where you can set a variety of system wide configurations.

Audiogram Display Options

The audiogram display options allow you to select the default display of the audiogram results in the portal display and reports. *Note: these options can be changed on the individual patient pages as you are viewing them.*

View

Choose between audiogram and table view.

Audiogram Overlays

You can select to display either the Hearing Loss Grades or the SHOEBOX Speech Banana overlay. These are beneficial when explaining results to patients.

Analysis

The Analysis section is used to specify items related to the analysis sections and options of displays and reports. These configuration settings include:

Averaging Calculation (Pure Tone Average or Average Hearing Level)

The selection of PTA/AHL will be displayed in the analysis section of your patient summary reports, and can also be selected from "shift types" when generating new reports. You can select the set of frequencies you would like to include in these averaging calculations to best meet your needs. We recommend configuring the PTA frequencies on your SHOEBOX Audiometer to match the frequencies you select here.

Calculation Standard (Shift/Grade)

This determines which calculations are included in the analysis section of the Individual Patient Screen and Summary Report. This will also determine which options are available for selection when generating reports. There are options tailored for hearing conservation programs, as well as clinical/research applications. The options include: OSHA, OSHA (with Age Correction), MSHA, MSHA (with Age Correction), CTCAE, and Brock.

Reports Configurations

The Reports section is used to specify items related to the display and content of your reports. These configuration settings include:

Report header

Upload a logo and input header text.

Demographics

Select which patient demographics you would like to include in the summary reports.

Components

Select which components you would like to include in your summary reports.

The screenshot shows the 'Report Configurations' page in a web application. On the left is a navigation sidebar with items: Dashboard, My Patients, All Patients, Projects, Reports, Data Admin, Users, Configurations (General, Reports, QuickTest). The main content area is titled 'Report Configurations' and has a 'Save' button in the top right. It is divided into two sections: 'Report Header' and 'Summary Report'. The 'Report Header' section shows a logo placeholder with the text 'YOUR LOGO HERE' and a text input field containing '22 Applewood Drive'. Below this is a 'Change Report Header Logo' button with a plus icon and a help icon, and a note: 'Drop a PNG or JPEG here to upload a new report header logo, minimum dimensions 200 x 80 pixels, and less than 5MB in size.' There is also a 'Remove Report Header Logo' link. The 'Summary Report' section is titled 'Patient Demographics' and includes a note: 'Enabling / disabling patient demographics affects what information appears in the Patient Demographics section of your Summary Reports.' It contains a grid of 16 checkboxes for various demographic fields: Last name, First name, Birth Date, External ID, Employee ID, Gender, Company, Hire Date, Department, Facility, Job Classification, School, Email, Home Phone, Work Phone, Cell Phone, Address, Health Card Number, Physician, Referring Physician, and Notes. Below this is the 'Components' section with a note: 'Enabling / disabling components affects what components appear on your Summary Reports.' It contains checkboxes for Patient Demographics, Analysis, Most Recent Audiogram, Audiogram History, Speech Results, and Questionnaires.

QuickTest Configurations

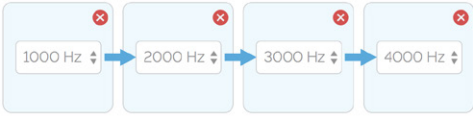
The 'QuickTest' page is where you configure settings for QuickTest, including the frequencies to test, upper and lower tone volumes, the logo you would to display on the welcome screen, the accent colour you would like to use throughout

QuickTest, and the ability to turn on and set a Privacy Statement. These settings will then be pushed to all of your QuickTest devices in your organization.

Download the QuickTest user guide at shoebox.md/support/shoebox-quicktest for more information.

QuickTest Configuration Save

Frequencies

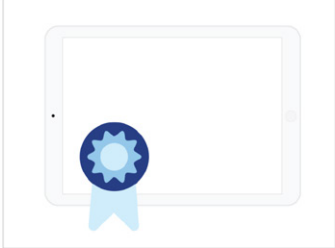


Tone Volume

Upper Tone Volume **Lower Tone Volume**

Branding

Welcome Screen



⊕ Change Welcome Screen Image ?

Drop a PNG here to upload a new Welcome Screen, minimum dimensions 1000 x 500 pixels, and less than 5MB in size.

[Reset to default Welcome Screen](#)

Accent Color

Accent Color affects buttons and small details throughout QuickTest.

















#FF0087

Privacy Statement

Include Privacy Statement

Symbols Legend









Audiogram Threshold Symbols

Symbol	Meaning	Symbol	Meaning
	Left air conduction		Right air conduction
	No response to upper limits air conduction, left		No response to upper limits air conduction, right
	Left masked air conduction		Right masked air conduction
	No response to upper limits masked air conduction, left		No response to upper limits masked air conduction, right
	Unmasked bone, left side		Unmasked bone, right side
	No response to upper limits unmasked bone, left side		No response to upper limits unmasked bone, right side
	Masked bone conduction left side		Masked bone conduction right side
	No response masked bone left side		No response masked bone right side

Tabular View Abbreviations

Symbol	Meaning	Symbol	Meaning
NR	No Response	M	Threshold obtained using masking
TN	Result too noisy	N/A	No threshold obtained
+M	Masking recommended		

Other Software Symbols

Symbol	Meaning	Symbol	Meaning
	New Patient		Patient Information
	Upload to web portal		Notes
	Add Item / Create New		Reorder Item
	Warning		Download

Symbols Legend: 4.x

Audiogram Threshold Symbols:

Symbol	Meaning	Symbol	Meaning	Symbol	Meaning
	Left air conduction		Right air conduction		Air (4.x)
	No response to upper limits air conduction, left		No response to upper limits air conduction, right		Masked air (4.x)
	Left masked air conduction		Right masked air conduction		Bone (4.x)
	No response to upper limits masked air conduction, left		No response to upper limits masked air conduction, right		Too Noisy (4.x)
	Unmasked bone, left side		Unmasked bone, right side		Unreliable (4.x)
	No response to upper limits unmasked bone, left side		No response to upper limits unmasked bone, right side		Needs Masking (4.x)
	Masked bone conduction left side		Masked bone conduction right side		Threshold should be re-tested (4.x)
	No response masked bone left side		No response masked bone right side		No Response (4.x)

Tabular View Abbreviations:

Symbol	Meaning	Symbol	Meaning	Symbol	Meaning
NR	No response	M	Threshold was obtained using masking	TN	Result too noisy
+B	Bone testing suggested	+M	Masking suggested	?	Unreliable

Other Software Symbols:

Symbol	Meaning	Symbol	Meaning	Symbol	Meaning
	Heard a sound (4.x)		Did not hear a sound (4.x)		New Patient
	Patient Information		Upload to web portal		Notes
	Add Item / Create New		Reorder Item		Warning