

SHOEBOX



AUDIOMETRY

Data Management,
Data Management PLUS
User Guide

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SB-QMS-727 Rev: 0 / 2019-01



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

Data Management	Data Management Plus (DM+)
	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 • Due-for-Testing reports
	Administrative control for assigning user access across projects

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

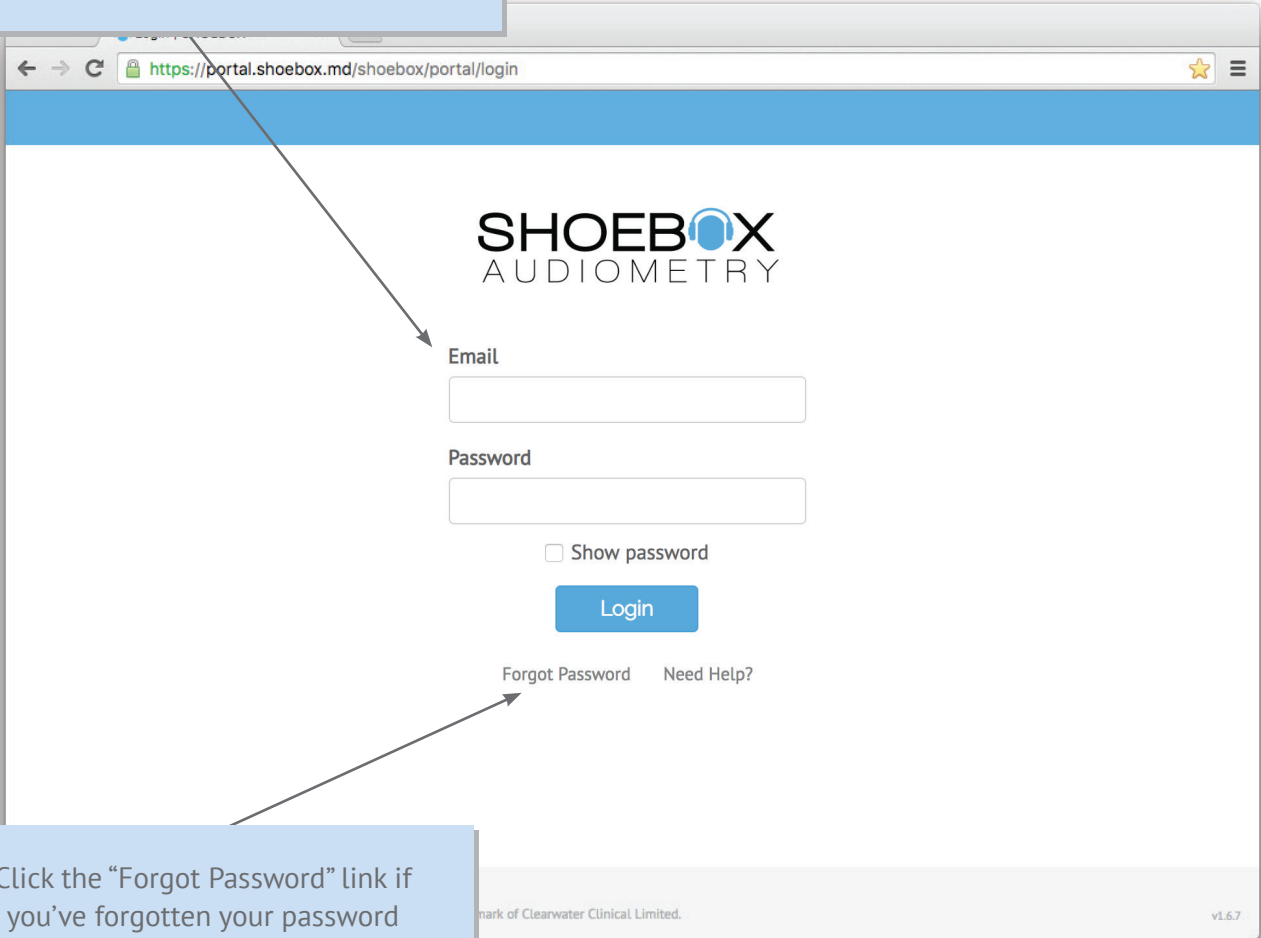
Portal Login

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

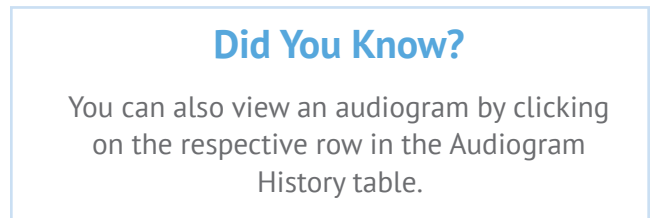
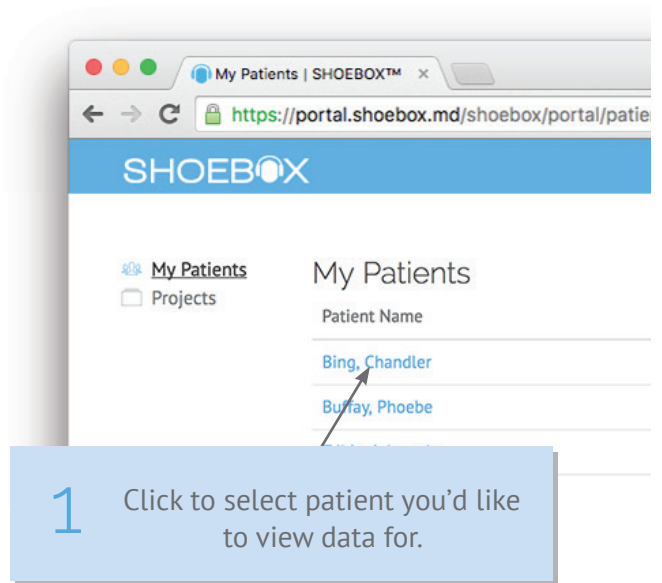
Working With Your Data

From the SHOEBBOX Data Management web portal, you can view and download patient test results that have been uploaded from the SHOEBBOX iPad. The 'My Patients' section will list all patients that you have created from your SHOEBBOX 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. You will see Patient Demographics, Analysis, Audiograms, Audiogram History, Speech Testing (if applicable), Questionnaire responses (if applicable), and Documents for that individual patient.

With DM+, you can set the baseline in the Audiogram History by selecting the box in the LB or RB column of the test you wish to set as baseline.

The Audiogram, Speech Testing (if applicable), and Questionnaire (if applicable) sections will display the latest test results for that particular patient.



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.

2

Click to mark audiogram as a baseline (DM+)

3

Click to view, download, or delete audiogram

Audiogram History New Audiogram

AHL Frequencies: 2000 Hz, 3000 Hz, 4000 Hz

Date	Time	RE	Right Thresholds (dB HL)								LB	Left Thresholds (dB HL)								AHL	
			500	1K	2K	3K	4K	6K	8K	500		1K	2K	3K	4K	6K	8K	Right	Left		
↵ 2019-01-25	12:00	<input type="checkbox"/>	10	20	20	20	25	25	30	<input type="checkbox"/>	10	15	20	20	30	30	30	22	23	⋮	
↵ 2019-01-15	12:00	<input checked="" type="checkbox"/>	15	20	20	25	25	25	25	<input checked="" type="checkbox"/>	10	20	20	25	25	30	30	23		⋮	
↵ 2018-01-17	12:00	<input type="checkbox"/>	10	20	20	25	25	25	30	<input type="checkbox"/>	15	20	20	25	25	25	30	23		⋮	
↵ 2017-01-10	12:00	<input type="checkbox"/>	15	20	25	25	30	30	40	<input type="checkbox"/>	10	10	15	15	20	25	25	27		⋮	

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

The screenshot shows the 'New Audiogram' form with the following fields and values:

- Test Date ***: 2019-01-28
- Test Time ***: 12:00 pm
- Examiner**: (empty)
- Transducer Model**: (empty)
- Transducer Serial**: (empty)
- Audiometer Model**: (empty)
- Audiometer Serial**: (empty)
- Calibration Date**: Select date
- Air**: (checked)
- Include Extended High Frequencies**: (unchecked)
- Right Ear**:
 - Frequency: 250Hz, 500Hz, 750Hz, 1000Hz, 1500Hz, 2000Hz, 3000Hz, 4000Hz, 6000Hz, 8000Hz
 - Threshold (dB): 40, 40, (empty), 35, (empty), 40, 45, 60, 75, 90+
- Notes**: (empty text area)
- Mark as Baseline**: (checked)
- Left Ear**:
 - Frequency: 250Hz, 500Hz, 750Hz, 1000Hz, 1500Hz, 2000Hz, 3000Hz, 4000Hz, 6000Hz, 8000Hz
 - Threshold (dB): 35, 40, (empty), 35, (empty), 40, 45, 60, 75, 90+
- Notes**: (empty text area)
- Mark as Baseline**: (checked)

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.

Setting Required Action

The purpose of the “Required Action” is to help manage triaging of patients when requesting reviews and retests. To set a required action for a patient, click on the patient name to go to the individual patient page. Click the “Set Next Action” button in the top right corner of the Required Action section above Patient Demographics.

Choose from the list of available actions and add a note to explain why the action is required. If a retest is required, check the “Retest Required” box below the dropdown.

When you’re done setting the next required action, click “Save Next Action”. You’ll notice the “Set

Did You Know?

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

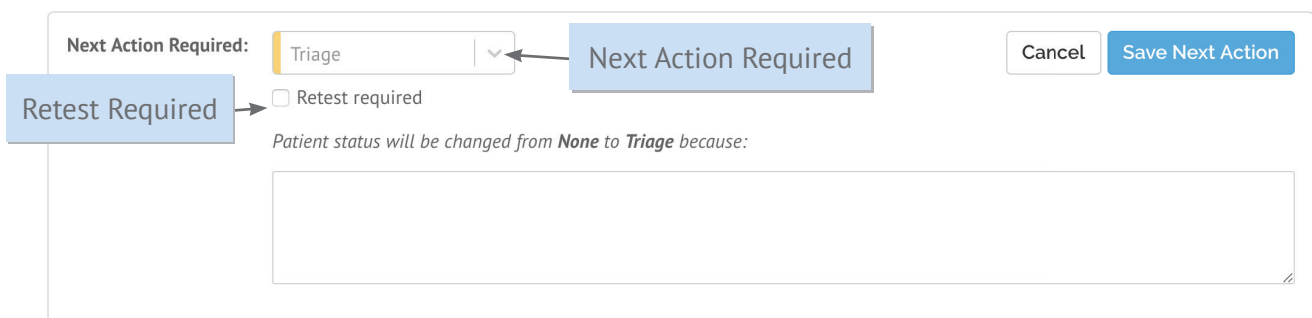
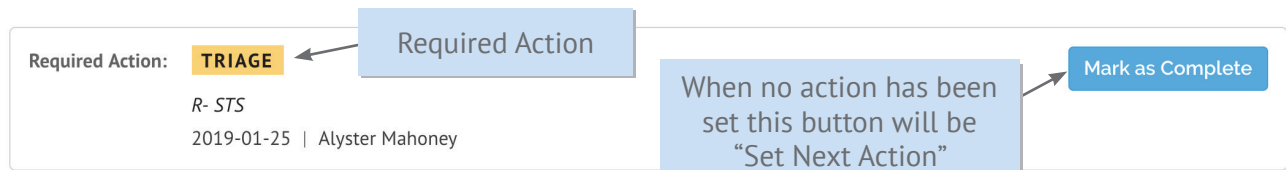
Next Action” button has changed to a “Mark as Complete” button.

When the action has been completed, click the “Mark as Complete” button. You’ll be prompted to set the next action required. If no further action is required, set this to “None”. Click “Save Next Action” when finished.

Noah Patients


Note: Noah is a system used by Audiologists and Hearing Instrument Specialists for patient management. This section only applies to organizations with Noah integration.

If you have Noah integrated with SHOEBBOX, all patients imported from Noah will display the “Noah” label next to the patient name. Patient demographics are not editable for patients imported from Noah.




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 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.

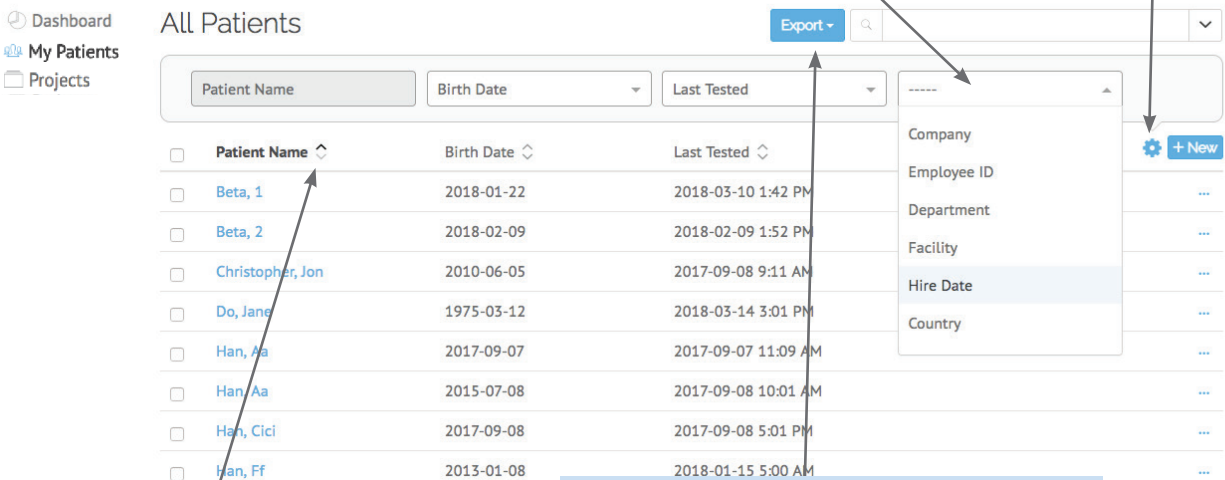
You can also sort the patient list by any of the four columns by selecting the  beside the column header.

Did You Know?

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

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

Select from the drop down to configure a column



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
<input type="checkbox"/> Han, Aa	2015-07-08	2017-09-08 10:01 AM
<input type="checkbox"/> Han, Cici	2017-09-08	2017-09-08 5:01 PM
<input type="checkbox"/> Han, Ff	2013-01-08	2018-01-15 5:00 AM

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, Date Range, Status, or Required Action, by selecting the down arrow beside the search bar and specifying the criteria.

Did You Know?

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

Did You Know?

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

Logout

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

Enter patient name or Employee ID, or use the down arrow to select from additional search criteria

The screenshot shows the 'My Patients' page in the SHOEBOX portal. The page title is 'My Patients' and the user is logged in as '<alyster.maloney+1@clear'. The page features a search bar with a dropdown arrow on the right. Below the search bar is a table of patients with columns for Patient Name, Gender, and Patient Status. The table contains three rows: 'McKinney, Mich N' (Female, Triage), 'One, Bob' (---, Triage), and 'Simpson, Sam' (Male, Triage). A 'Required Action: Triage' filter is applied. A dropdown menu is open on the right side of the search bar, showing filter options: Project (Select Project), Date Range (Select...), Status (Select Status), and Required Action (Triage). A blue callout box at the bottom left points to the search bar with the text 'Click to remove search criteria.'







Patient Name	Gender	Patient Status
McKinney, Mich N	Female	Triage
One, Bob	---	Triage
Simpson, Sam	Male	Triage


Click to remove search criteria.


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

-  Administration
 - 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 patients and audiograms from external systems.

Reports

Run and retrieve reports.

Data Admin

View past data import activities and import patients and audiograms outside of a project.

Administration

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, speech banana overlays, or established baseline), patient demographic selections, patient demographic protection, averaging calculations, shift/grade calculations, and test program rules.

Reports

Set report configurations, including report header and logo, patient demographics selections, which you wish to include in your patient summary reports, and enable/disable report confirmation.

QuickTest

Configure QuickTest settings: frequencies to be tested, tone levels, and welcome screen, accent colour, and privacy summary.

- Dashboard
- My Patients
- All Patients
- Projects
- Reports
- Data Admin
- Administration
 - Users
 - Billing
 - Transducers
- Configurations
 - General**
 - Reports
 - QuickTest

General Configurations

Save

Audiogram Display Options

The audiogram display options will change the default way that audiograms are displayed throughout the portal and on reports. **Note: audiograms containing Extended High Frequency (EHF) results will automatically be displayed in table view.**

- Display Views: Individual Audiograms Table
- Additional Overlays: Hearing Loss Grades (Audiograms only)
 Speech Banana (Audiograms only)
 Established Baseline

Patient Demographics

Enabling / disabling patient demographics affects what information appears in the Portal as well as the SHOEBOX App.

Personal

- First Name
- Middle Name
- Last Name
- Birth Date**
- Gender**

**Required for shift calculation

Employment

- Employee ID
- Hire Date
- Department
- Job Classification
- Job Position
- Status

Contact

- Email
- Home Phone
- Work Phone
- Cell Phone
- Address

More Information

- Notes

Import

Only visible on portal

- External ID

Location

- Company
- School
- Facility

Health

- Health Card No.
- Physician
- Referring Physician

Patient Demographics Protection

When enabled, patient demographics for imported patients on both the SHOEBOX app and portal will not be editable. **Note: Ensure any app-side patient demographic changes are reflected in the portal prior to enabling this feature.**

- Prevent imported patient demographics from being edited

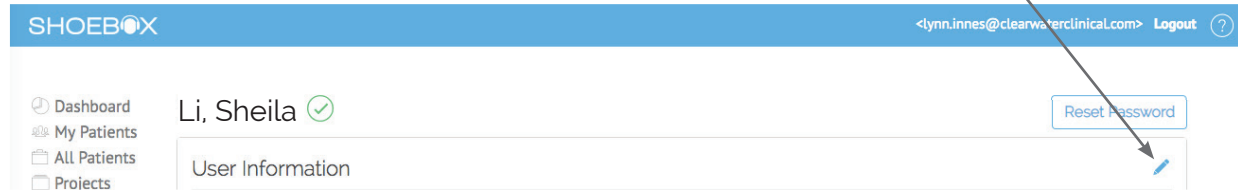
Analysis

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.

Sharing Data

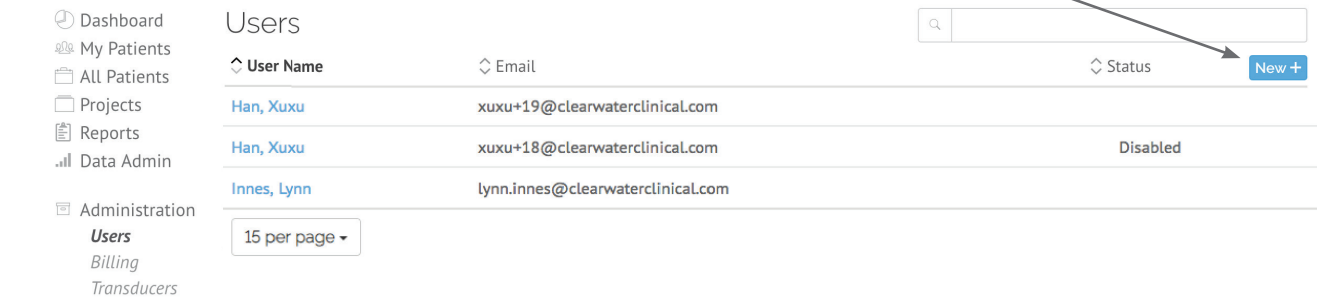
By default, all non-admin users are only able to view patients and test results that they have created. If you would like to provide users with the ability to view test results and patients created by other members of your organization, contact support@shoebox.md for configuration assistance.

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.

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.

Export [Search] [Dropdown]

Documents Last Updated [Gear] **+ New**

Create Patient

Personal

First Name *
Middle Name
Last Name *
Birth Date
Gender

Employment

Employee ID
Hire Date
Department

Close Create

Person47, FirstName47 Male None

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 assigning 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.

2017-09-06 4:37 PM ...

2017-09-06 4:24 PM

2017-09-05 10:36 AM

2017-08-14 1:51 PM

2017-08-12 6:41 AM ...

Summary Report
+ Add to Project
Delete

Importing Existing Data

If you would like to import patients or audiograms from an existing system, you can do so from either the Data Admin page, or by opening the project you wish to put them in. If adding them from the Data Admin page, the patients and audiograms will not be associated with a project.

⊕ 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.

Patient or audiogram data must be in a properly formatted CSV file to be imported into the SHOEBBOX system. To upload your CSV, click on the + icon on the “Import Patients and Audiograms” import box, or drag the CSV file onto the import box. Files must be less than 10MB and conform to the SHOEBBOX CSV formatting guidelines.

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.

If patients or audiograms are added from within a project, they will automatically be added to that project, and patients will be transferred to the iPad 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.

If patients or audiograms are added from the Data Import page and not associated with a project, they will be transferred to the iPads of any user in your organization, and available under “Default project (unassigned)”

Long St Clinic Export ▾

Project Details Cancel Save

Name *

Description

Start Date × End Date ×

Status

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.

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

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:

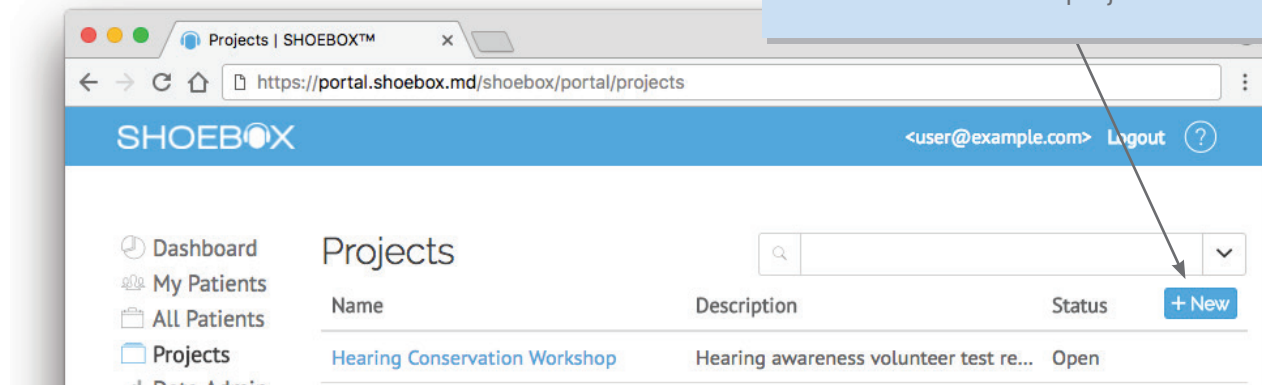
Clinic Locations
Patient Demographics
Patient Referral Status
Special Events

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 SHOEBBOX iPad, users are still able to access and upload data to closed projects.

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



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 CSV

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

CSV Audiograms CSV

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

CSV Patients List CSV

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

CSV SRT Results CSV

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

CSV <name> QNR CSV

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 CSV

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' interface. On the left is a navigation menu with items like 'Dashboard', 'My Patients', 'All Patients', 'Projects', 'Reports', 'Data Admin', 'Administration', and 'Configurations'. The main area displays a table of patients with columns for 'Patient Name' and 'Gender'. The 'Export' button is highlighted, and a dropdown menu is open showing options: ZIP Individual Summary Reports, CSV Speech Discrim Results, CSV Audiograms, CSV Patients List, CSV SRT Results, CSV AAATest QNR, CSV Hearing Conservation Qantas QNR, CSV Hearing Conservation 1 QNR, CSV HHIE-S QNR, and CSV HHIA-S QNR. A 'More Actions' button is also highlighted for a patient.

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 audiogram display options icon to see alternate display options

- Dashboard
- My Patients
- All Patients
- Projects
- Reports
- Data Admin
- Administration
 - Users
 - Billing
 - Transducers
- Configurations
 - General
 - Reports
 - QuickTest

Furlong, James

Required Action: **UPDATE BASELINE**
careful
 2019-01-16 | Alyster Mahoney

Mark as Complete

Patient Demographics

Personal

First Name
James

Last Name
Furlong

Birth Date
2018-12-05

Employment

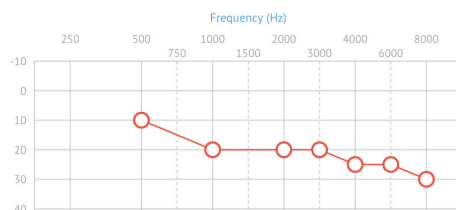
Employee ID

More Demographics

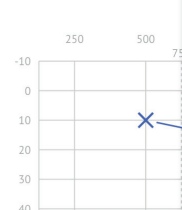
Audiogram: 2019-01-25

Right Ear Results:

AHL: 22



Left Ear Results:



Display Views

- Individual Audiograms
- Table

Additional Overlays

- Hearing Loss Grades
- Speech Banana
- Established Baseline

Baseline overlay is not available in single audiogram view.

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 “Reports 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.

Due-for-Testing Report

This report generates a list of people who need to be tested within a specified date range. This report is only enabled when Testing Program Rules are set in General Configurations.

The screenshot shows the 'Reports' page interface. It is divided into two main sections: 'Build New Report' and 'Generated Reports'. The 'Build New Report' section contains four buttons: '+ Roster Report', '+ Standard Shift Report', '+ Recordable Shift Report', and '+ Due-for-Testing Report'. A callout box points to these buttons with the text 'Select Report Type to enter Report details and run the report'. The 'Generated Reports' section features a table with columns for 'Report Title', 'Project', and 'Generated on'. A callout box points to a download icon in the 'Generated on' column with the text 'Click the download icon to download a report'. Another callout box points to the entire 'Generated Reports' section with the text 'Reports area where generated reports are stored for downloading'. Below the table, there is a '15 per page' dropdown menu. A note above the table states 'Reports will no longer be accessible after 30 days.'

Report Title	Project	Generated on
AdultG1, R3 - Summary Report	---	2018-12-07 2:10 PM

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/Due-for-Testing).
2. Enter the Filter Criteria. You can specify the following:
 - a. The project for which you want to run the report.
 - b. The date range or testing due date. *Note: select “custom” from the list to specify your own date range. The testing due date is always specified from today to a date in the future.*
 - c. The calculation standard. (Not applicable to Due-for-Testing report). *Note: the contents of this list will depend on your configuration.*

Did You Know?

You can scroll down in the dropdowns to see more selection

The screenshot shows the 'Standard Shift Report' filter criteria form. It includes fields for 'Project' (set to 'All Projects'), 'Date Range' (set to 'Select...'), and 'Calculation Standard' (set to 'AHL'). There are also 'Advanced filters' and 'Grouped first by' sections. Callouts point to the 'Calculation Standard' dropdown, the 'Project selection' dropdown, and the 'Date Range' dropdown, which is noted as being for 'Due-for-Testing report only'. Buttons for 'Export', 'Apply', and an upward arrow are also visible.

- To add advanced filters and group information, click “More Options”. You can choose to filter and group by any patient demographic. If you wish to add multiple filters, click the  to add additional filters. Click the delete icon  to remove additional filters.

You can additionally choose to group test subjects by one or two levels of groupings. For example, you could group test subjects first by department, and then by job classification. Test subjects will then be organized under the headings of their job classifications, and then under a greater heading of each department.

Filter Criteria
Apply

Project: | v

Date Range: | v

Calculation Standard: | v

^

Advanced filters:

| v

x 🗑

| v

x +

Grouped first by: x | v **followed by:** | v

- 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.

Results Summary

Summary ←

Total Employees Tested: 2
Employees with OSHA standard threshold shifts (age adjusted): 1
Threshold shifts are calculated using the frequencies: 2K, 3K, and 4K Hz
Age adjustment has been applied according to OSHA standard specified in Appendix

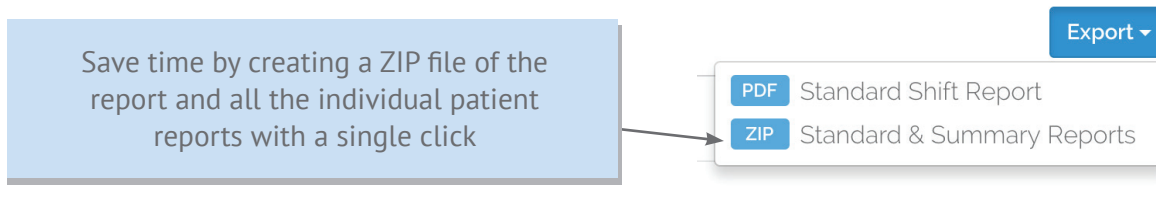
Click a patient to pull up their individual summary view, or use the action buttons

Employee List

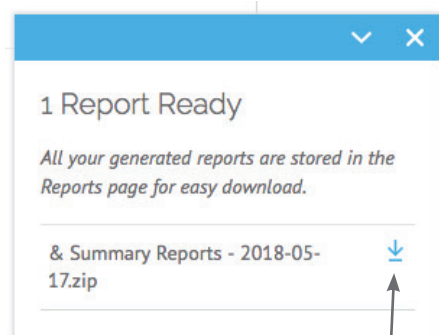
Patient Name	Birth Date	Employee ID	Project	Last Test Date	Right STS	Left STS	⋮
Brook, Jenny	1960-01-01		aaaimport	1994-09-24	11.0	11.0	⋮

15 per page v

5. If you want to save the report, select “Export”, and select which report you would like to save:
 - a. The Standard/Recordable/Roster/Due-for-Testing Report PDF is a pdf file of the report seen on the screen.
 - b. The Standard/Recordable/Roster/Due-for-Testing & Summary Reports ZIP 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.



6. 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.



Download Icon

Note: While your report is generating, you can continue other work in the portal. You can 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.

When paying by 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. The top navigation bar includes the SHOEBOX logo and user information (user@email.com, Logout, and a help icon). The left sidebar contains a menu with categories: Dashboard, My Patients, All Patients, Projects, Reports, Data Admin, Administration (Users, Billing, Transducers), and Configurations (General, Reports, QuickTest). The main content area is titled 'Billing' and contains four sections: 1. Billing Address: Shows 'Fancy Organization' at '123 Real St, Ottawa, Ontario, K1Y 1B2, Canada'. 2. Credit Card Information: Shows a masked card number ending in '4242', expiration 'Expires 11 / 23', and name 'RICK FLAIR'. 3. Billing Notifications: Includes a note that 'Billing notifications include invoices and payment related notifications. Billing users receive billing notifications by default.' and lists 'Billing Users: user@email.com' and 'Send copies of notifications to: billing@notifications.com'. 4. Billing History: Shows '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.

Additional Overlays

You can select to display the Hearing Loss Grades, SHOEBOX Speech Banana, or Established Baseline overlays. These are beneficial when explaining results to patients.

Patient Demographics

The Patients Demographics section is used to enable or disable patient demographics in the portal and the SHOEBOX app. Disabled patient demographics will not appear on the portal or the app.

Patient Demographics Protection

The Patient Demographics Protection section allows you to specify whether you would like to prevent imported patient demographics from being edited.

Note: Ensure any app-side patient demographic changes are reflected in the portal prior to enabling this feature.

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.

General Configurations

Save

Audiogram Display Options

The audiogram display options will change the default way that audiograms are displayed throughout the portal and on reports. Note: audiograms containing Extended High Frequency (EHF) results will automatically be displayed in table view.

Display Views: Individual Audiograms Table

Additional Overlays: Hearing Loss Grades (Audiograms only)
 Speech Banana (Audiograms only)
 Established Baseline

Patient Demographics

Enabling / disabling patient demographics affects what information appears in the Portal as well as the SHOEBOX App.

Personal

Employment

Contact

More Information

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.

Test Program Rules

The Test Program Rules section is used to automatically generate test due dates based on the values set in this section. These configuration settings include:

Initial Test

This determines the time period initial testing must be completed within after initial hire or creation date of a patient. Enabling and setting values for Initial Testing will generate

test due dates for patients who either have no audiograms or were hired after their latest audiograms. If no hire date is set, the creation date of the patient will be used.

Regular Testing

This determines the time period in which regular testing should be conducted for a patient. Enabling and setting values for Regular Testing will generate test due dates within a specified period of time after a patient's last test. This should reflect the general limit for how long patients can go untested.

Retesting

This determines the time period in which retesting should be conducted for a patient, after their previous test. Enabling and setting values for retesting will generate test due dates when patients are flagged as requiring a retest. The date will be calculated based on the value input in this section.

Initial Test Enable

Enabling and setting values for Initial Testing will generate test due dates for patients who either have no audiograms, or were hired after their latest audiogram. Note: if no hire date is set, creation date of patient will be used.

Initial Testing must be completed within of hire date or creation date.

Regular Testing Enable

Enabling and setting values for Regular Testing will generate test due dates within a specified period of time after a patient's last test. This should reflect the general limit for how long patients can go untested.

Regular Testing should always be completed within of previous test.

Retesting Enable

Enabling and setting values for Retesting will generate test due dates when patients are flagged as requiring a retest. The date will be calculated based on the value input below.

Retesting should be completed within of previous test.

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.

Report Confirmation

The Report Confirmation section is used to specify if Subject and Examiner confirmations are required when saving a report generated in the SHOEBOX app.

Subject Confirmation

Choose to enable a confirmation tab in the app-generated report that will require confirmation by the subject. You can input a custom message or use our default.

Examiner Confirmation

Choose to enable a confirmation tab in the app-generated report that will require confirmation by the examiner. You can input a custom message or use our default.

- Dashboard
- My Patients
- All Patients
- Projects
- Reports
- Data Admin
- Administration
 - Users
 - Billing
 - Transducers
- Configurations
 - General
 - Reports**
 - QuickTest

Report Configurations

Save

Report Header



22 Applewood Drive.
New York, NY

5 lines max.

⊕ Change Report Header Logo



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.

[Remove Report Header Logo](#)

Summary Report

Patient Demographics

Enabling / disabling patient demographics affects what information appears in the Patient Demographics section of your Summary Reports.

Personal

- First Name
- Middle Name
- Last Name
- Birth Date
- Gender

Employment

- Employee ID

QuickTest Configurations

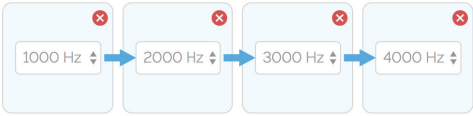
The 'QuickTest' page is where you configure settings for QuickTest, including the frequencies to test, upper and lower tone volumes, the logo you would to display on the welcome screen, the accent colour you would like to use throughout

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



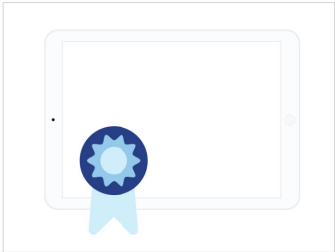
Tone Volume

Upper Tone Volume **Lower Tone Volume**

40 dB 30 dB

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
	Connection Status		Notes
	Add Item / Create New		Reorder Item
	Warning		Download
	Syncing		Unable to Sync
	Synced		Not Connected
	Upload to Web Portal		

Symbols Legend: 4.x

Symbols that were in use prior to SHOEBOX 5.0










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