



SHOEBOX Data Management and Data Management PLUS

User Guide

Think Outside of the Booth!™

Introduction

Welcome to SHOEBBOX Data Management and Data Management PLUS (DM+)!

SHOEBBOX Data Management is a secure, cloud-based web portal that offers a convenient way to store and analyse patient and audiogram information captured in SHOEBBOX. Simply log in to the web portal on your browser to access and manage your data.

This user guide will help you learn all the capabilities of SHOEBBOX Data Management and Data Management PLUS (DM+).

If your iPad was provided by SHOEBBOX, you'll find all necessary user guides in your iBooks app.

We'd love to help any way we can, so don't hesitate to reach out to us at support@shoebox.md if you have any questions.

Data Management vs Data Management PLUS (DM+) Summary

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 patient/employee data & results synced from the SHOEBOSX device in one complete list	Centrally view patient/employee data & results synced from the SHOEBOSX device in one complete list
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 SHOEBOSX devices
	Easy import of historical audiograms, including baselines
	Organize data on the portal into projects, then synchronize patient lists to 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 employee/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

	<ul style="list-style-type: none">• Batched ZIP reports• Due-for-Testing reports
	Administrative control for assigning user access across projects



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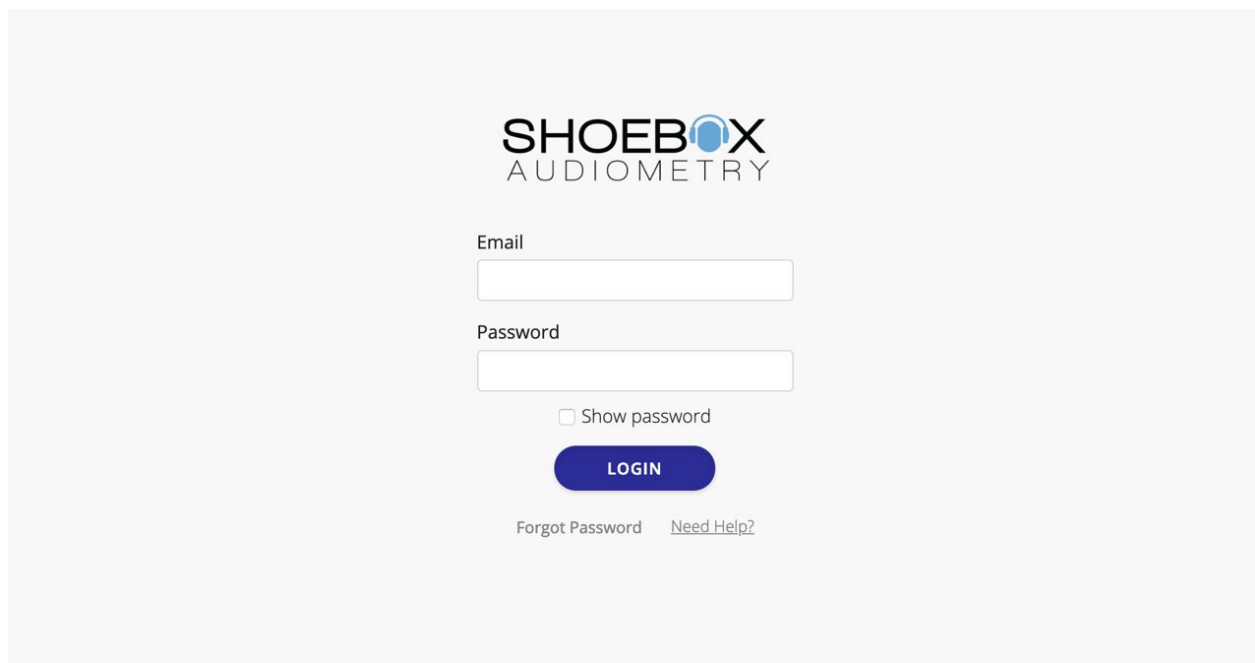
Getting Set Up

Logging in

To log in to the SHOEBBOX Data Management web portal, go to <https://portal.shoebox.md> and enter your email and password.

Your email will be the one where you receive your SHOEBBOX emails, and the password is the one you previously created.

Hint: These are the same login credentials as the ones you use on the iPad to log into SHOEBBOX or QuickTest. If you don't know what these are, contact support@shoebox.md.



SHOEBBOX
AUDIOMETRY

Email

Password

Show password

LOGIN

[Forgot Password](#) [Need Help?](#)

Forgot your password?

Click the “Forgot Password” link on the login screen and enter the email associated with your SHOEBBOX account. You’ll receive an email with directions on how to reset your password.

Remember: this will change the password you use to log in to SHOEBBOX or QuickTest on the iPad as well!

Getting to Know the Navigation

Depending on your individual account permissions and product licenses, you'll see the following pages in your portal navigation:

Dashboard

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

Patients

My Patients

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

All Patients

List, manage, and review all patients in your organization and their associated results where you have been given access (through projects).

Participants (QuickTest only)

List QuickTest participants and their results, download a full CSV.

Reports

Run and retrieve reports for SHOEBOX patients.

Data Admin

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

Projects

Manage projects, and import patients and audiograms from external systems into a project.

Settings

Administration

Users

Create and manage users.

Billing

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

SHOEBOX

General

Set system settings for default audiogram displays, patient demographic selections and protection, shift/grade and averaging calculations, and test program rules.

Reports

Set report settings, including report header and logo, patient demographics selections, and enable/disable report confirmation.

*QuickTest *New* (See QuickTest user guide)*

General

Configure splash screen logo and heading, contact form inputs, and privacy statement.

Test Setup

Configure noise level, test frequencies, starting tone volume, category segments, post-results call to action pages.

Language

Set the display language for your QuickTest iPad

QuickTest Legacy


General

Configure test frequencies, tone levels, welcome screen, accent colour, and privacy statement.

Billing


Note: only billing users have access to the billing page.

Account billing details are managed on an organizational basis. Your organization may be set up to pay by credit card, or to pay by invoice. Depending on your payment method, you'll see the following sections:


- **Billing Address:** where you can set or edit your billing address. For organizations paying by credit card, this section must be filled out before credit card information can be set.
- **Credit Card Information:** where you can set your credit card information. This section must be filled out in order to unlock the portal for your organization's users. *Note: Only visible to organizations paying by credit card.*
- **Billing Notifications:** a list of all current billing users. You can also add an additional email to be copied on all billing-related emails.
- **Billing History:** your invoice history and payment status. You can download past invoices by clicking the  symbol.




SHOEBOX alyster@email.com LOGOUT ?




Billing

Billing Address 

The Beauty Inc.
123 Main St.
Ottawa, 90289
Aland Islands

Credit Card Information 


Accepted Cards: ?   

Credit Card Number  Expiration (MMYY)  CVW 

Error: Credit Card Number required *Error: Expiration required*

First Name Last Name

Credit card address same as billing address

Billing Notifications 

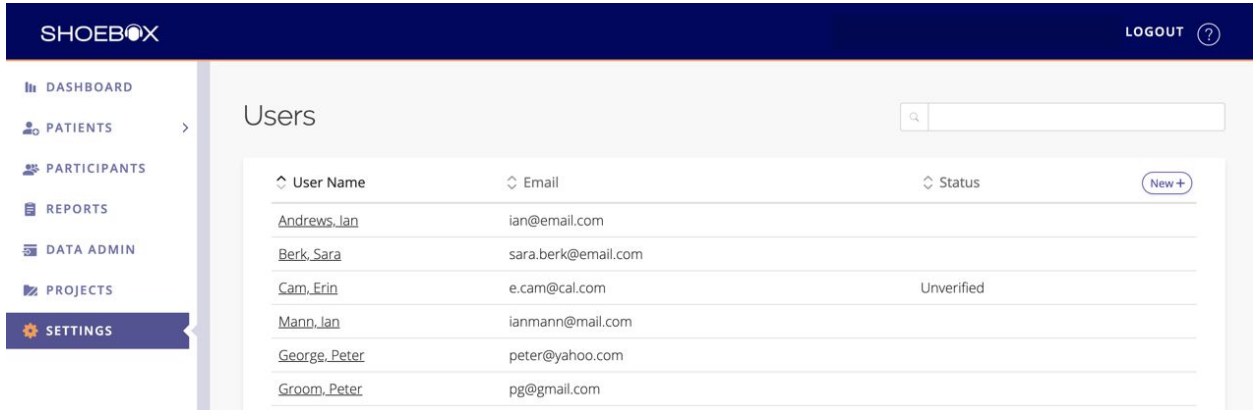
Billing notifications include invoices and payment related notifications. Billing users receive billing notifications by default.

Billing Users: nick@gmail.com Send copies of notifications to: No additional email set

Billing History

Managing Users (DM+)

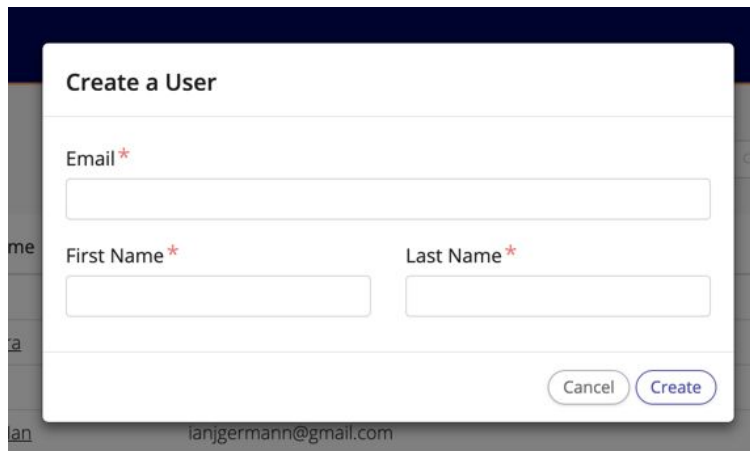
All users in your organization will be listed on the Users page.



To add a new user:


1. Click the “New” button.
2. Add the user’s name and email address.
3. Click “Create”.

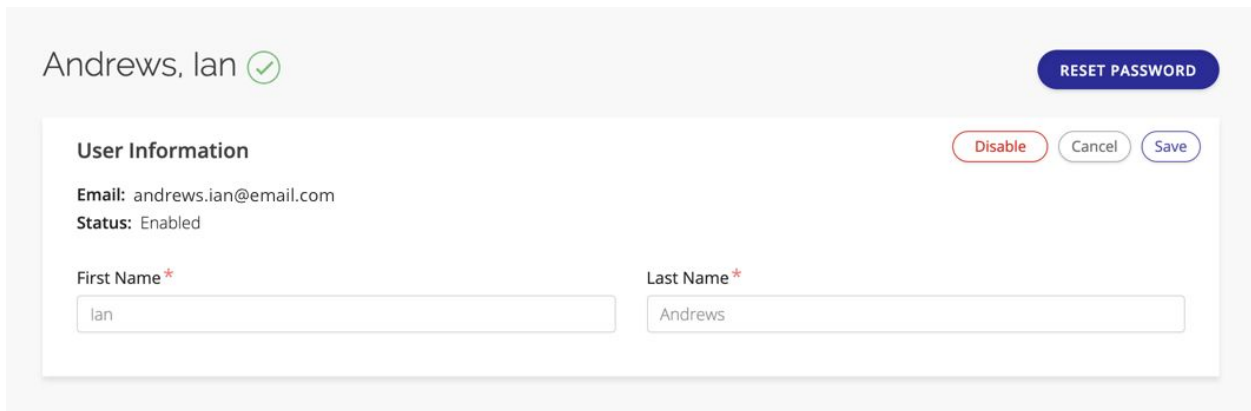
Note: To create Admin users, contact support@shoebox.md.



Once a user is added, they have to verify their account in order to use the portal. To verify their account, they must click the “Set Up Account” button in the email they receive from SHOEBBOX and create a password.


To edit an existing user:

1. Click on the user's name in the list.
2. Click  in the top right corner of the User Information section.
3. Edit the user's first and/or last name.
4. Click "Save".



The screenshot shows the user information page for 'Andrews, Ian'. At the top left, the name 'Andrews, Ian' is displayed with a green checkmark icon. To the right is a blue 'RESET PASSWORD' button. Below this is a 'User Information' section with a red 'Disable' button, a grey 'Cancel' button, and a blue 'Save' button. The 'Email' is 'andrews.ian@email.com' and the 'Status' is 'Enabled'. There are two text input fields: 'First Name*' containing 'ian' and 'Last Name*' containing 'Andrews'.

From the individual user page, you can also perform various actions related to user status:

- Disable the user. *Hint: to access the "Disable" button, click  in the top right corner of the User Information section.*
- Send a password reset email.
- Resend a verification email (if the user has not already been verified).
- Unlock the user (if the user has been locked due to too many unsuccessful login attempts).
- Enable the user (if the user is disabled).

Importing Patients & Audiograms (DM+)


Patients and audiograms can be imported from an existing system to SHOEBBOX by using a properly formatted CSV file.

To download our Data Import Reference Guide as well as a template CSV file, visit shoebox.md/support/shoebox-data-management.

You have two options for importing data:

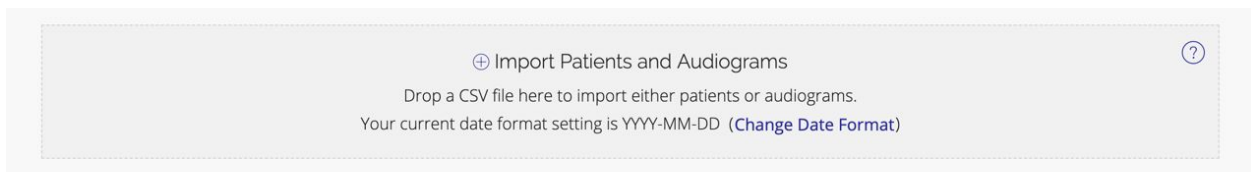
1. Import data globally to SHOEBBOX.
2. Import data in association with a specific project.

To import data globally:


1. Go to the Data Admin page.
2. Click  or drag and drop a CSV file onto the grey "Import Patients and Audiograms" box.

Note: Patients must be imported **before** audiograms.

3. The imported file(s) will appear in the Import History section.
4. Patients will be accessible on the iPad of any user in your organization, available under "Default Project (unassigned)".



To import data in association with a specific project:

1. Go to Projects.
2. Click on the project name in the list.
3. Click  or drag and drop a CSV file onto the grey "Import Patients and Audiograms" box.

Note: Patients must be imported **before** audiograms.

4. Imported data will be automatically added to the project, and patients will be accessible on the iPad of any user who has access to the project.
5. The imported file(s) will appear in the Import History section of the Data Admin page.

Getting Started With Patients and Participants

Note: Patients are associated with SHOEBOS Standard and Pro, and Participants are associated with QuickTest. If you do not have QuickTest, you will not see Participants in the portal. If you do not have SHOEBOS, you will not see Patients.

Find an Existing Patient (Imported or SHOEBOS Created), or Participant (QuickTest Created)

Any patients that have been imported (see [Importing Patients & Audiograms](#) for more information) or created in SHOEBOS on the iPad will be available on the Patients page.

Any participants that have been created in QuickTest on the iPad will be available on the Participants page.

If you're a non-administrative portal user, you'll only be able to see patients that you personally created, or participants that were created on the device you were signed into.

If you're a DM+ admin user, you'll be able to see all patients or participants in your organization, regardless of who created them.

The screenshot shows the 'My Patients' interface. At the top left is the title 'My Patients'. To its right is a search bar containing the text 'Simone' and an 'EXPORT' button. Below the search bar is a '+ Filter Criteria' button. The main content is a table with the following columns: Patient Name, Gender, Patient Status, Last Updated, and a '+ New' button. The table contains one row with the patient name 'Moharad, Simone', gender '---', status 'Update Baseline', and last updated date '2019-01-28 3:25 PM'. At the bottom left of the table is a '15 per page' dropdown menu.

<input type="checkbox"/> Patient Name	<input type="checkbox"/> Gender	<input type="checkbox"/> Patient Status	<input type="checkbox"/> Last Updated	<input type="checkbox"/> + New
<input type="checkbox"/> Moharad, Simone	---	Update Baseline	2019-01-28 3:25 PM	...

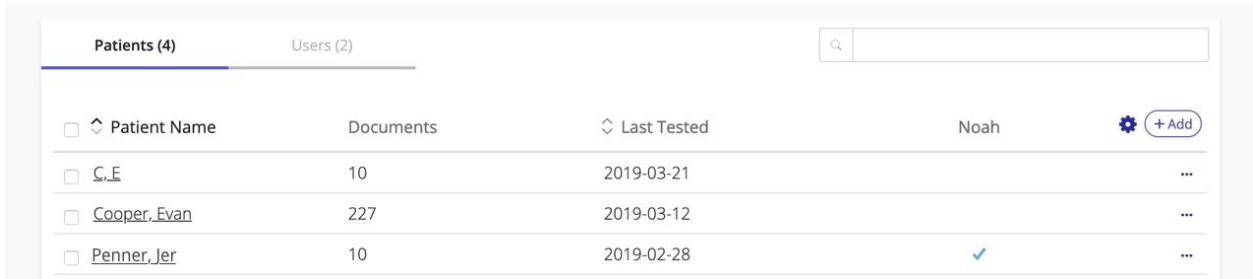
You can search for a specific patient by typing their name or Employee ID in the search box on the upper right hand side of the Patients page.

You can search for a specific participant by typing their name in the search box on the upper right hand side of the Participants page.

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, you can turn on the Noah column on the Patient page to see which patients are imported from Noah. See [Patient List Display Options](#) for more information on columns.



<input type="checkbox"/> Patient Name	Documents	<input type="checkbox"/> Last Tested	Noah	+ Add
<input type="checkbox"/> C.E	10	2019-03-21		...
<input type="checkbox"/> Cooper, Evan	227	2019-03-12		...
<input type="checkbox"/> Penner, Jer	10	2019-02-28	<input checked="" type="checkbox"/>	...

Create a New Patient (DM+)

You can create new patients from the Patients page.

To create a patient:

1. Click the “New” button.
2. Add the relevant patient demographics. Required fields are marked with a *.
3. Click “Create” to create the patient.

Create Patient

Personal

First Name *

Middle Name

Last Name *

Birth Date
Select date

Gender

Location

Company

School

Facility

Contact

Email

Work Phone

Cell Phone

Employment

Employee ID

Hire Date
Select date

Department

Job Classification

Job Position



Status
Active

Cancel Create



Patient and Participant List Display Options

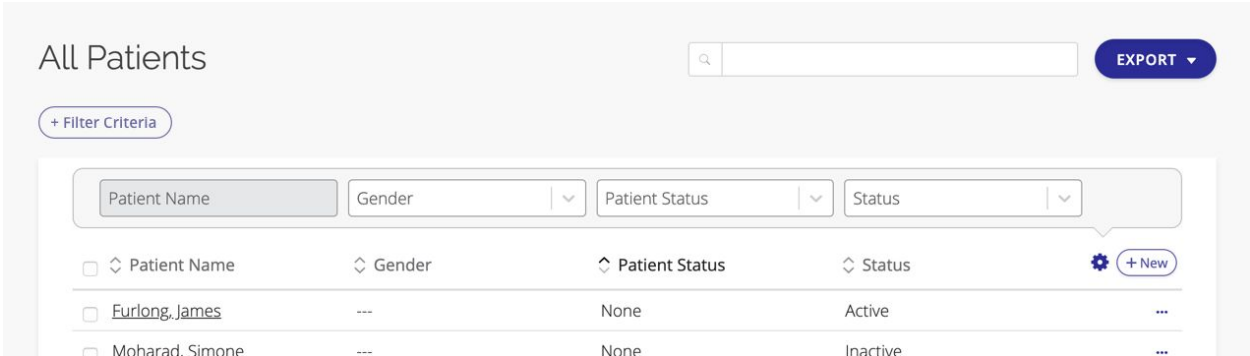
You can change which columns are displayed on the Patients and Participants pages, as well as sort the patient or participant list by any of the four columns (provided they contain sortable data).

To change which columns are displayed:

- 1. Click  to open the column display options.
- 2. Select from the drop down menu above each column to change that column data.
Note: Patient / Participant name will always be displayed in the first column.
- 3. Remove a column by selecting "----" in the drop down menu.
- 4. Click  to close the column display options when you're done.

To sort the patient or participant list:

- 1. Click  beside the column header you wish to sort by. You can choose to sort in ascending or descending order.
- 2. If no  appears beside the column header, the list cannot be sorted by that column's data.



QuickTest Results and Sites

If you're a QuickTest user and want to see Participant results, make sure to display the "QuickTest Result" column on the Participants page. If you want to see your configured Sites, make sure to display the "Sites" column.




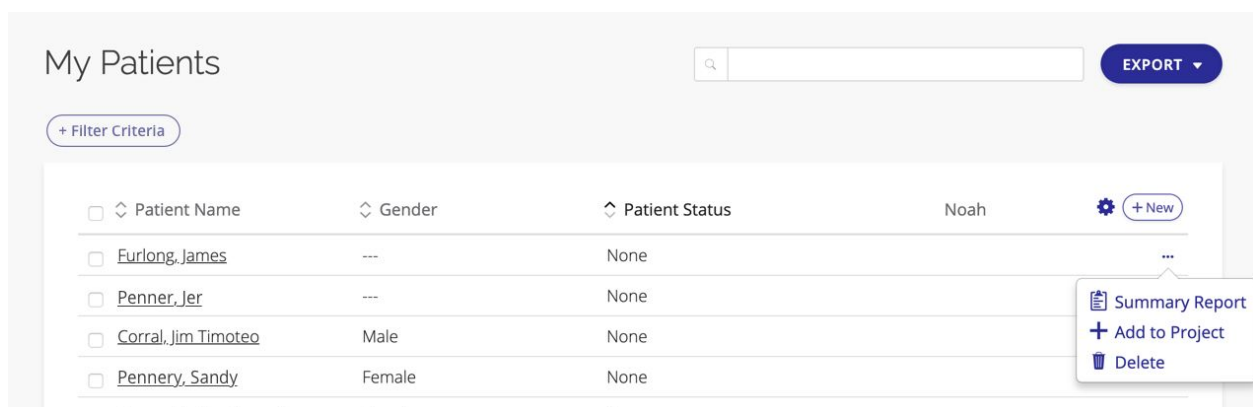
Name	Test Date	Site	QuickTest Result
Penner, Jer	2019-01-30	Site #53	



Patient and Participant List Actions

From the Patients page, you can download a patient's summary report*, add them to a project, or delete them.

To perform one of these actions:

1. Find the patient in the list.
2. Click  on the far right of the row.
3. Select which action you'd like to perform.



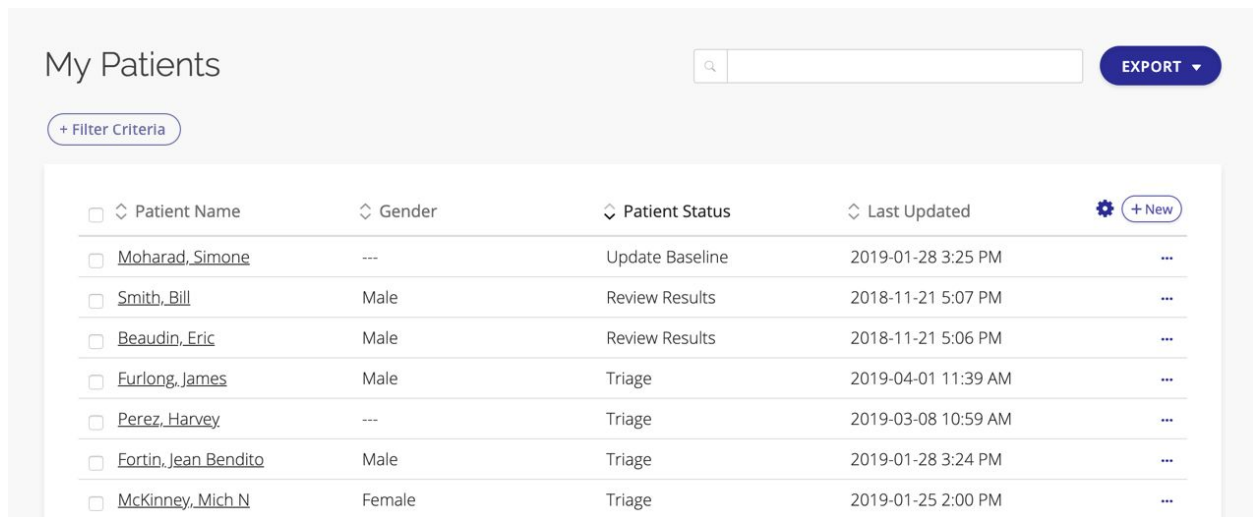
Patient Name	Gender	Patient Status	Noah	
<input type="checkbox"/> Furlong, James	---	None		
<input type="checkbox"/> Penner, Jer	---	None		
<input type="checkbox"/> Corral, Jim Timoteo	Male	None		
<input type="checkbox"/> Pennery, Sandy	Female	None		

*For more information on summary reports, see [Getting to Know the Summary Report](#).

From the Participants page, you can delete a participant.

Working With Individual Patient Data

If you're responsible for reviewing patient test results on an individual basis, you can access them by clicking on a patient's name in the list on the Patients page.



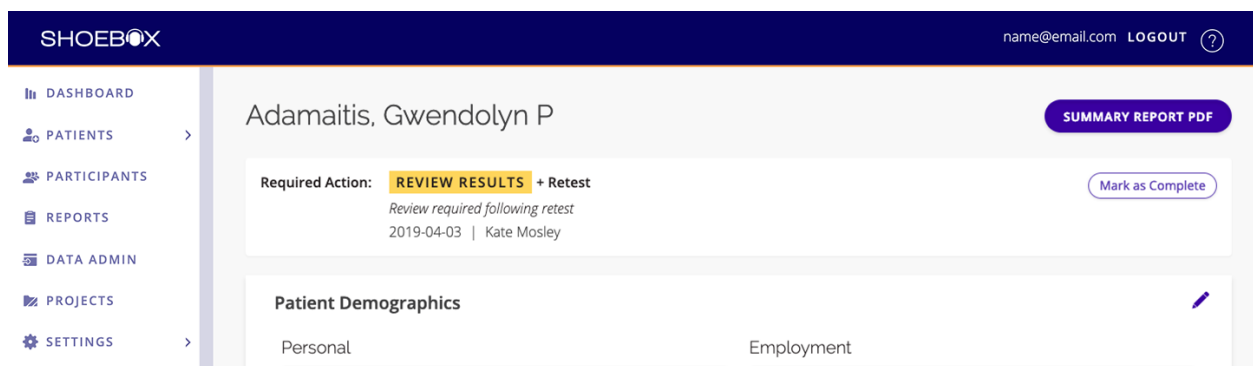
The screenshot shows the 'My Patients' page with a search bar, an 'EXPORT' button, and a '+ Filter Criteria' button. Below is a table of patient records:

<input type="checkbox"/>	◇ Patient Name	◇ Gender	◇ Patient Status	◇ Last Updated	⚙️ + New
<input type="checkbox"/>	Moharad, Simone	---	Update Baseline	2019-01-28 3:25 PM	...
<input type="checkbox"/>	Smith, Bill	Male	Review Results	2018-11-21 5:07 PM	...
<input type="checkbox"/>	Beaudin, Eric	Male	Review Results	2018-11-21 5:06 PM	...
<input type="checkbox"/>	Furlong, James	Male	Triage	2019-04-01 11:39 AM	...
<input type="checkbox"/>	Perez, Harvey	---	Triage	2019-03-08 10:59 AM	...
<input type="checkbox"/>	Fortin, Jean Bendito	Male	Triage	2019-01-28 3:24 PM	...
<input type="checkbox"/>	McKinney, Mich N	Female	Triage	2019-01-25 2:00 PM	...

Getting to Know the Individual Patient Page

The Individual Patient page contains several sections. What you'll see is dependent on what tests and activities have been performed.

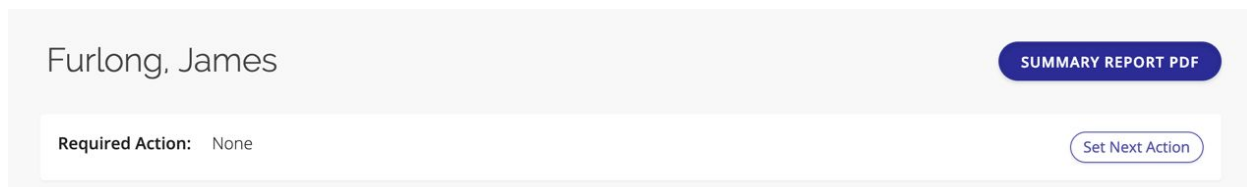
Only tests and activities (Audiogram, SRT / SDT, Speech Discrimination, and Questionnaires) from the most recent testing session will be displayed. Past tests and activities will be available in the Documents section.



The screenshot shows the individual patient page for Adamaitis, Gwendolyn P. The page includes a navigation sidebar on the left with options: DASHBOARD, PATIENTS, PARTICIPANTS, REPORTS, DATA ADMIN, PROJECTS, and SETTINGS. The main content area displays the patient's name, a 'SUMMARY REPORT PDF' button, and a 'Required Action' section with a yellow 'REVIEW RESULTS + Retest' button and a 'Mark as Complete' button. Below this is the 'Patient Demographics' section with tabs for 'Personal' and 'Employment'.

Required Action

The purpose of the Required Action section is to help manage the progress of patients when requesting reviews and retests.

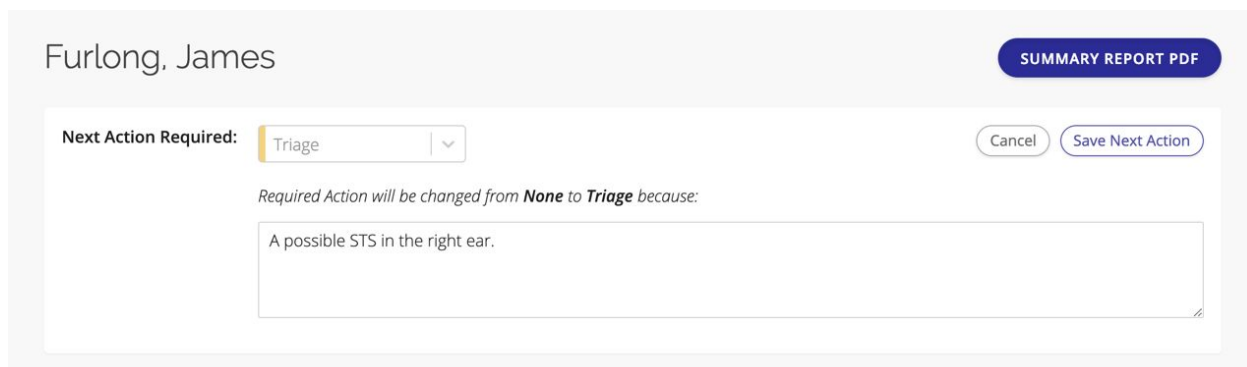


Furlong, James SUMMARY REPORT PDF

Required Action: None Set Next Action

To set a required action for a patient:

1. Click the “Set Next Action” button in the top right corner of the Required Action section.
2. Choose from the dropdown list of available actions.
3. Add a note to explain why the action is required.
4. If a retest is required, check the “Retest Required” box below the dropdown.
5. Click “Save Next Action”.
6. You’ll notice the “Save Next Action” button has changed to a “Mark as Complete” button.



Furlong, James SUMMARY REPORT PDF

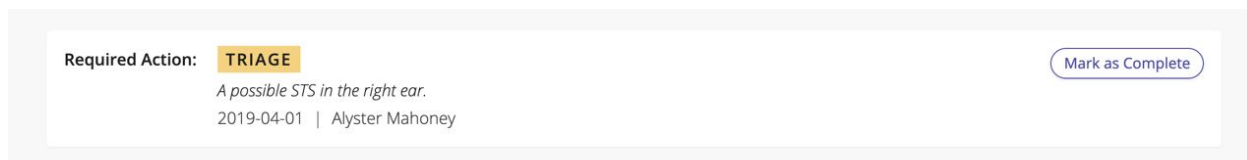
Next Action Required: Triage Cancel Save Next Action

Required Action will be changed from **None** to **Triage** because:

A possible STS in the right ear.

When the action has been completed:

1. Click the “Mark as Complete” button.
2. You’ll be prompted to set the next action required. Follow the steps outlined above. If no further action is required, set this to “None”.



Required Action: **TRIAGE** Mark as Complete

A possible STS in the right ear.
2019-04-01 | Alyster Mahoney

Patient Demographics

This section contains information like patient name, birthdate, gender, contact information, employee information, etc.

To configure which fields appear in this section:

1. Go to Settings > SHOEBOS > General.
2. Find the Patient Demographics section.
3. Select / deselect which fields you would like to appear.
Note: this affects both the web portal and SHOEBOS app.
4. Click "Save" in the top right hand corner to save your changes.


Patient Demographics

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

Personal	Employment	Contact	More Information
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Notes
<input checked="" type="checkbox"/> Middle Name	<input checked="" type="checkbox"/> Hire Date	<input type="checkbox"/> Home Phone	
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Work Phone	Import
<input checked="" type="checkbox"/> Birth Date**	<input checked="" type="checkbox"/> Job Classification	<input checked="" type="checkbox"/> Cell Phone	<i>Only visible on portal</i>
<input checked="" type="checkbox"/> Gender**	<input checked="" type="checkbox"/> Job Position	<input type="checkbox"/> Address	<input type="checkbox"/> External ID
<i>**Required for shift calculation</i>	<input checked="" type="checkbox"/> Status		

Location	Health
<input checked="" type="checkbox"/> Company	<input type="checkbox"/> Health Card No.
<input checked="" type="checkbox"/> School	<input type="checkbox"/> Physician
<input checked="" type="checkbox"/> Facility	<input type="checkbox"/> Referring Physician

To edit patient demographics, click  in the top right hand corner of the Patient Demographics section.

Patient Demographics 

Personal	Location
First Name James	Company Beauty Inc.
Middle Name	School
Last Name Furlong	Facility
Birth Date 1977-04-22	

Employment

To configure whether patient demographics for imported patients are editable or read-only:

1. Go to Settings > SHOEBOS > General.
2. Find the Patient Demographic Protection section.
3. Click the checkbox to prevent imported patient demographics from being edited.
4. Click "Save" in the top right hand corner to save your changes.

Patient Demographics Protection

*When enabled, patient demographics for imported patients on both the SHOEBOS 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

Users with Noah integration should note that regardless of enabling Patient Demographic Protection, Noah imported patients cannot be edited in the web portal or the SHOEBOS app.

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

Analysis

This section contains questionnaire scores (if applicable), as well as Shift or Grade calculations.

Analysis		
	Right	Left
OSHA Standard Threshold Shift (2k, 3k, 4k)	Yes (13.3)	Yes (18.3)
OSHA Recordable Shift (STS and 25dB min avg)	Yes	Yes
Hearing status for speech range (0.5, 1, 2, 3k Avg)	Mild (33.7)	Normal (25.0)
Hearing status for higher pitch sounds (4, 6, 8k Avg)	Moderately severe (66.7)	Moderate (55.0)

To configure which Shift / Grade calculations are shown (DM+):

1. Go to Settings > SHOEBBOX > General.
2. Find the Calculation Standards section under Analysis.
3. Select which Shift / Grade calculations you would like to use. *Hint: this also affects which Shift / Grade calculations can be selected when creating a report.* Options include:
 - OSHA.
 - OSHA with Age Correction.
 - MSHA.
 - MSHA with Age Correction.
 - CTCAE.
 - Brock.
4. Click "Save" in the top right hand corner to save your changes.

Calculation Standard (Shift / Grade)

The Calculation Standard determines what calculations display in the Analysis section of an Individual Patient Screen and Summary Report, as well as what shift types are available for selection in the Reports section.

<input checked="" type="checkbox"/> OSHA	<input checked="" type="checkbox"/> OSHA with Age Adjustment	<input type="checkbox"/> CTCAE
<input checked="" type="checkbox"/> MSHA	<input checked="" type="checkbox"/> MSHA with Age Adjustment	<input type="checkbox"/> Brock

Audiogram

This section contains the most recent audiogram. Audiograms can be viewed in both Audiogram view and Table view.

Audiogram View:

- Displays individual audiograms at full screen view.
- Displays a combined audiogram at mobile screen view.
- Does not include extended high frequencies.
- Overlays include Hearing Loss Grades, Speech Banana, and Established Baseline.

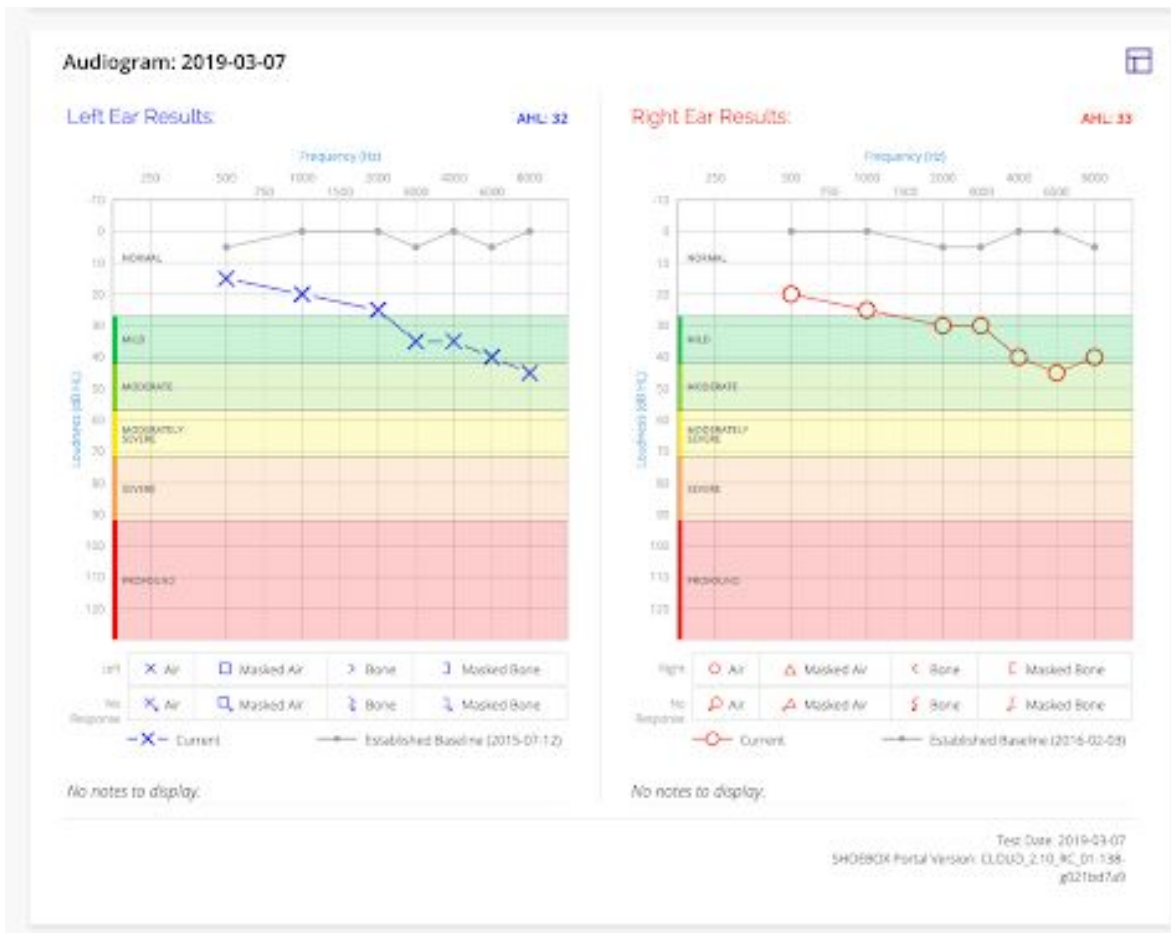
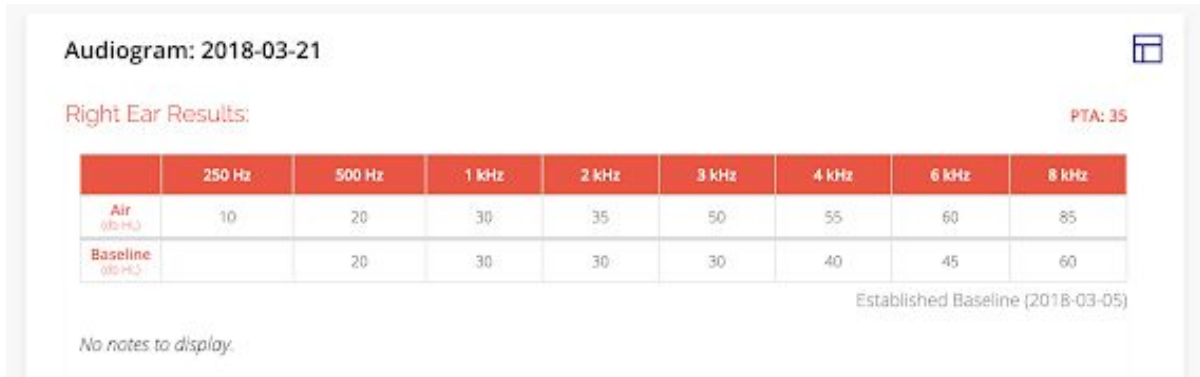



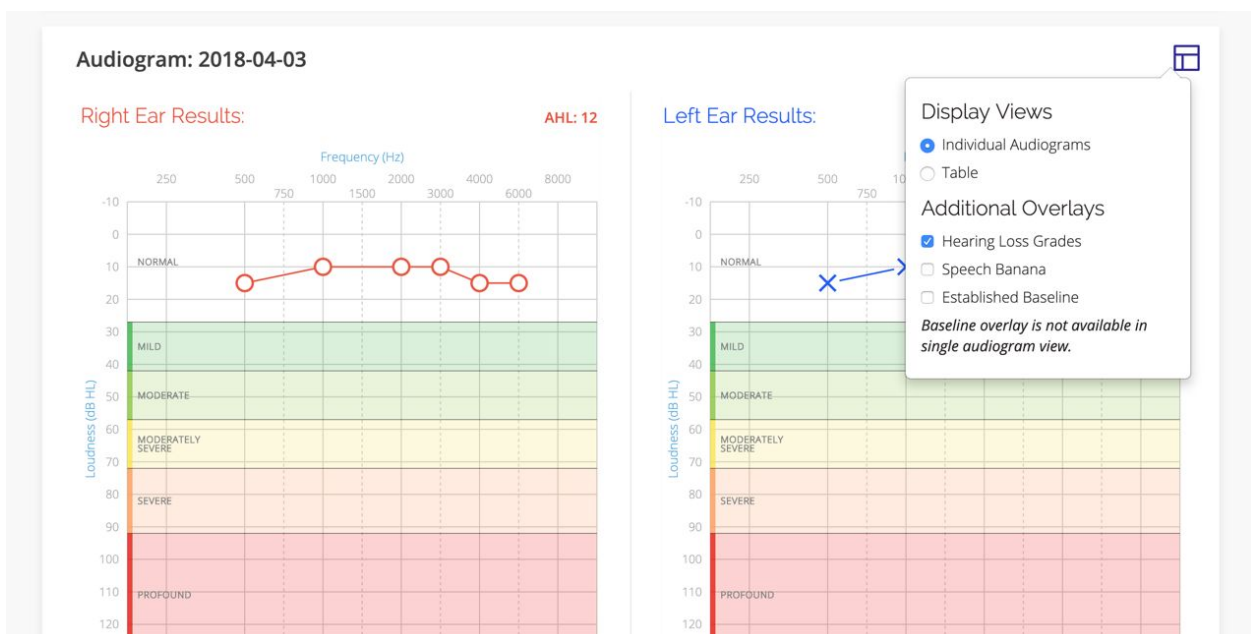
Table View:

- Displays individual audiograms in separate tables.
- Includes extended high frequencies. *Hint: tests including extended high frequencies will default to table view.*
- Overlays include Established Baseline.



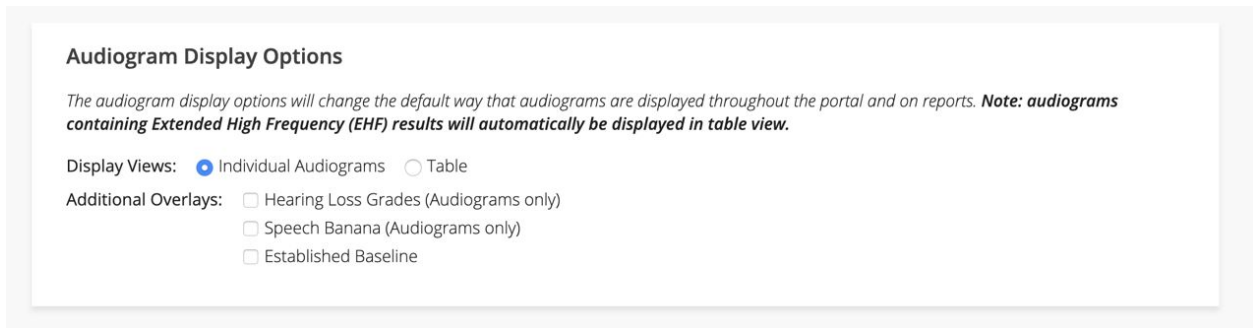
To change display options, such as switching from audiogram to table view or turning on / off overlays:

1. Click  in the far right corner of the Audiogram section.
2. Choose which display view you'd like to use.
3. Select or deselect any additional overlays.
4. Click anywhere outside the popover to close options.



To configure which display options are shown by default for your organization (DM+):

1. Go to Settings > SHOEBBOX > General.
2. Find the Audiogram Display Options section.
3. Choose which default view you'd like to use.
4. Select or deselect any additional overlays.
5. Click "Save" in the top right hand corner to save your changes.



Audiogram History

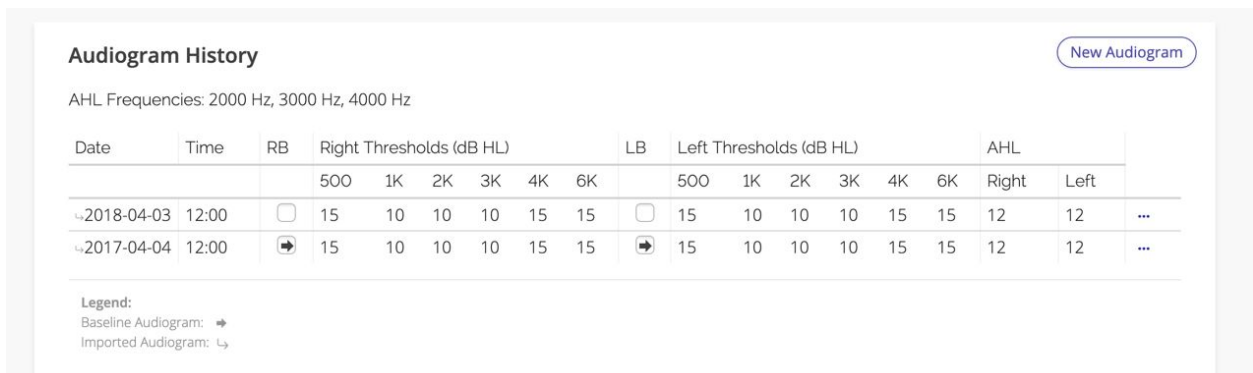
This section contains all past and present audiograms associated with the patient.

Imported audiograms are indicated with a ↶ while SHOEBBOX-created audiograms have no indication.

You'll also see either AHL (Average Hearing Level) or PTA (Pure Tone Average) calculations (depending on your organization's settings) for each of those audiograms, as well as a list of which frequencies are being used for said calculations.

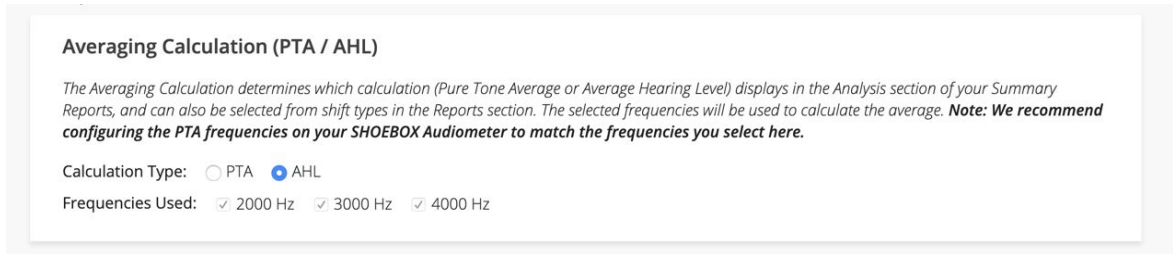
To mark an audiogram as a baseline (DM+):

1. Click the box in the LB (Left Baseline) or RB (Right Baseline) column of the test you wish to set as a baseline.



To configure whether AHL or PTA calculations are used (DM+):

1. Go to Settings > SHOEBOS > General.
2. Find the Averaging Calculation section under Analysis.
3. Select which calculation type you want to use (PTA or AHL).
4. For PTA, select which frequencies you would like to use for calculations. *Hint: we recommend configuring the PTA frequencies in your SHOEBOS app to match the ones you select here.*
5. Click "Save" in the top right hand corner to save your changes.



To manually input a historical patient audiogram (DM+):

1. Click the "New Audiogram" button in the right corner of the Audiogram History section.
2. A modal will appear with all necessary fields for adding audiogram data.
3. For each frequency, you can input a number to indicate a threshold (e.g. 70) or a number with a plus sign (+) to indicate a no response (e.g. 90+). Leave any untested frequencies blank.
4. When you're done adding all audiogram data, click "Save".

Note: audiograms cannot be edited, so ensure all data is correct before clicking "Save".

5. The audiogram will now display in the Audiogram History section as well as in the Documents section.

Speech Testing

This section contains any applicable SRT / SDT and Speech Discrimination testing results from the most recently conducted Speech tests.

Speech Testing

Left Ear Results			
SRT		Speech Discrimination	
Threshold	Masked R	Result	Level
25 dB HL		100%	50 dB HL

Speech Discrimination Notes: *No notes to display.*

Speech Discrimination Word List: Nu-6 Form A List 1a

Right Ear Results			
SRT		Speech Discrimination	
Threshold	Masked L	Result	Level
50 dB HL		60%	50 dB HL

Speech Discrimination Notes: *No notes to display.*

Speech Discrimination Word List: Nu-6 Form A List 1b

Questionnaire

This section contains any applicable questionnaire answers from the most recently completed questionnaire.

HHIA-S

Hearing Handicap Inventory for Adults - Screening

Instructions
Please select "yes," "no," or "sometimes" in response to each of the following items. Do not skip a question if you avoid a situation because of a hearing problem. If you use a hearing aid, please answer the way you hear without the aid.

Questions

1. Does a hearing problem cause you to feel embarrassed when you meet new people?	Sometimes
2. Does a hearing problem cause you to feel frustrated when talking to members of your family?	Yes
3. Do you have difficulty hearing/understanding co-workers, clients or customers?	Yes
4. Do you feel handicapped by a hearing problem?	Yes
5. Does a hearing problem cause you difficulty when visiting friends, relatives, or neighbors?	Sometimes
6. Does a hearing problem cause you difficulty in the movies or in the theater?	No
7. Does a hearing problem cause you to have arguments with family members?	Yes
8. Does a hearing problem cause you difficulty when listening to TV or radio?	Yes
9. Do you feel that any difficulty with your hearing limits or hampers your personal or social life?	Sometimes
10. Does a hearing problem cause you difficulty when in a restaurant with relatives or friends?	Sometimes

Result
 Total Score: 28

Interpretation
 0-8 suggests no hearing handicap
 10-24 suggests mild-moderate hearing handicap
 26-40 suggests significant hearing handicap

^

Documents

This section contains all test results in reverse-chronological order. You can view any test result by clicking on it.

Audiogram test results will be downloaded as a PDF, and all others will be displayed as web-only viewing.



Getting to Know the Summary Report

You can export a Summary Report PDF from an individual patient page, or from the  menu on the Patients page.



A Summary Report can include the following information:

- Patient demographics.
- Analysis.
- The most recent audiogram.
- The audiogram history table.
- The most recent speech results (SRT / SDT and Speech Discrimination).
- The most recently completed questionnaire.

To configure what demographics and components are included on a Summary Report (DM+):

- Go to Settings > SHOEBBOX > Reports.
- Find the Summary Report section.
- Select / deselect which fields and components you would like to include in the Patient Demographics and Components sub-sections.

Note: you'll only be able to choose from patient demographics that are enabled in General Settings.

- Click "Save" in the top right hand corner to save your changes.

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

Location

- Company
- School
- Facility


Contact

- Email
- Work Phone
- Cell Phone

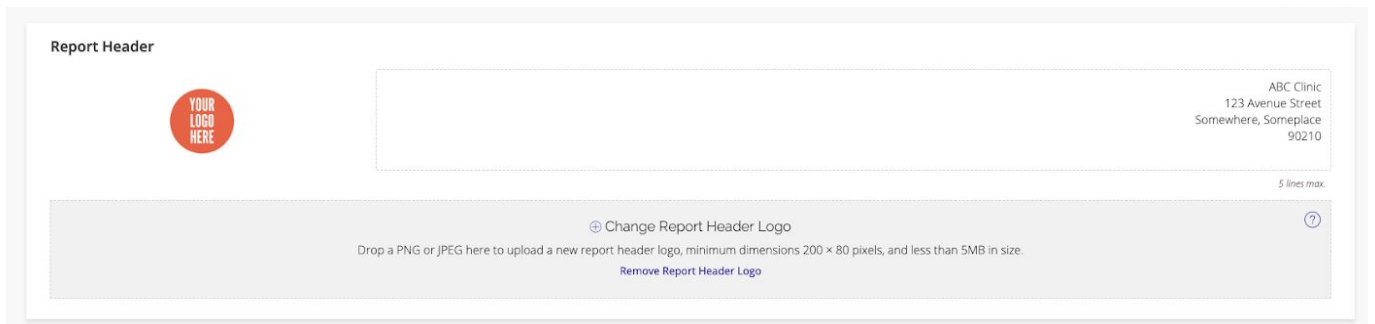
Components
Enabling / disabling components affects what components appear on your Summary Reports.

- Patient Demographics
- Analysis
- Most Recent Audiogram
- Audiogram History
- Speech Results
- Questionnaires

To configure what the report header looks like on your Summary Report:

1. Go to Settings > SHOEBBOX > Reports.
2. Find the Report Header section.
3. Click  or drag and drop your logo onto the grey “Change Report Header Logo” box.
4. Enter up to 5 lines of header text in the text box.
5. Click “Save” in the top right hand corner to save your changes.

Note: this report header will be applied to all downloaded PDF reports.



The screenshot shows a configuration interface for a report header. At the top left, the title "Report Header" is displayed. Below the title, there is a red circular logo placeholder with the text "YOUR LOGO HERE". To the right of the logo is a large, empty text box for entering header text. In the bottom right corner of the text box, the text "5 lines max" is visible. Below the text box is a grey rectangular area for changing the logo. This area contains the text "Change Report Header Logo" with a plus icon, a help icon, and a question mark. Below this text is the instruction "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." and a link labeled "Remove Report Header Logo".

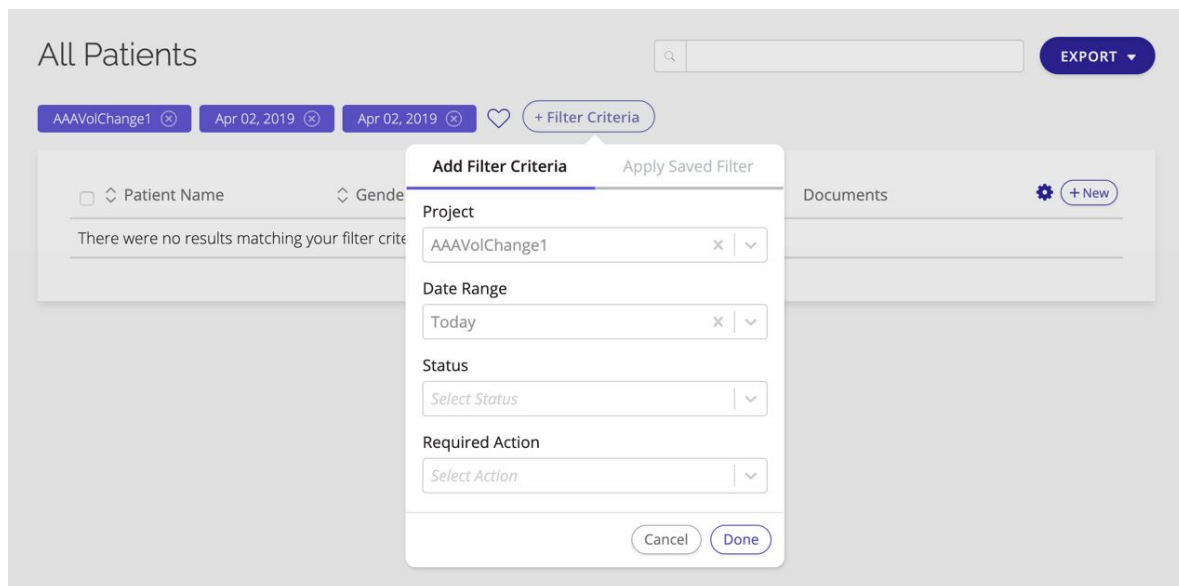
Working With Filters

Filters allow you to organize your data in several ways. You can use filters on the Patients page and when building Reports.


Adding Filters

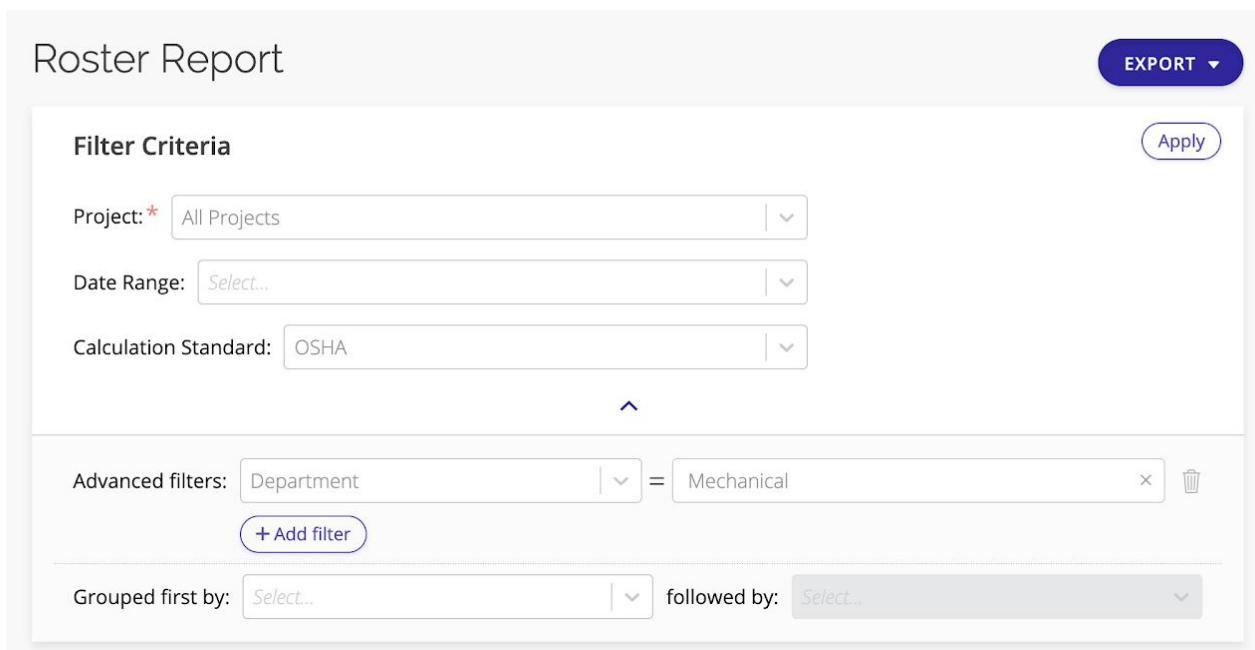
On the Patients page:

1. Click "+ Filter Criteria" button.
2. Add your desired filter criteria.
3. Click "Done" when finished.
4. Filter criteria will be applied to the Patients page.
5. Filter criteria can be removed by clicking on the "X" on the filter criteria button.



When building a Report:

1. See [Working With Reports](#) for more information on building a report.
2. From within the Filter Criteria section, click “More Options”.
3. Add your desired filter criteria in the Advanced Filters sub-section.
4. Filter criteria can be removed by clicking on  next to the respective filter.
5. Click “Apply” when finished.
6. Filter criteria will be applied to your report.




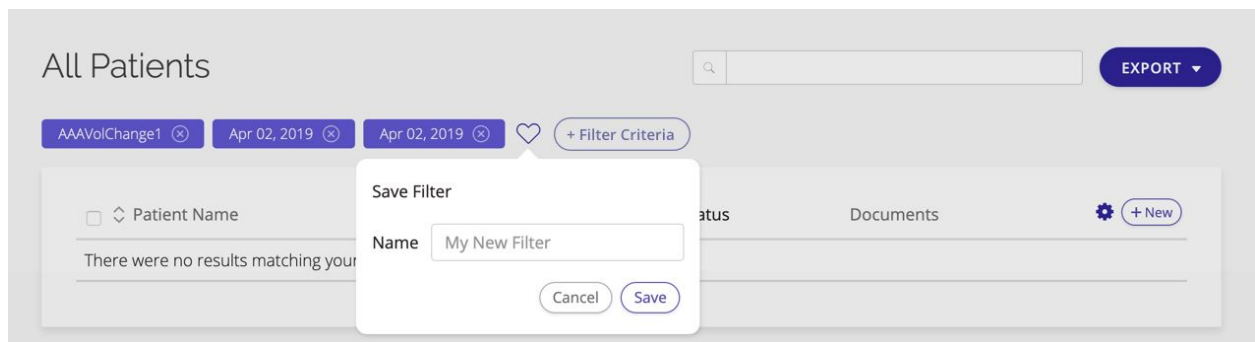
The screenshot shows the 'Roster Report' configuration interface. At the top right is an 'EXPORT' button with a dropdown arrow. Below the title is the 'Filter Criteria' section, which includes an 'Apply' button. This section contains three dropdown menus: 'Project' (set to 'All Projects'), 'Date Range' (set to 'Select..'), and 'Calculation Standard' (set to 'OSHA'). Below this is an 'Advanced filters' section with a filter rule: 'Department' (dropdown) = 'Mechanical' (text input). There are 'x' and trash icons to the right of the rule, and a '+ Add filter' button below. At the bottom, there are two more dropdown menus: 'Grouped first by' (set to 'Select..') and 'followed by' (set to 'Select..').

Saving Filters

You can save combinations of filter criteria as, “Saved Filters,” for easy access.

To create a Saved Filter:

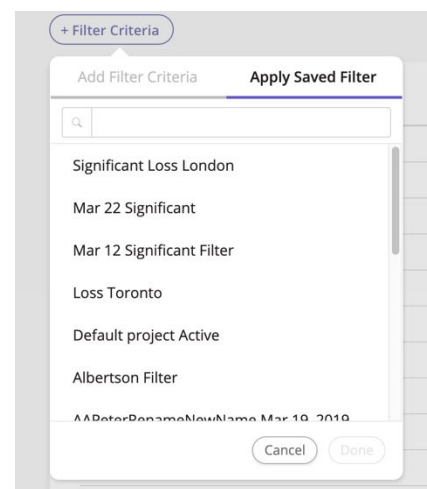
1. Add your desired filter criteria as described in Adding Filters.
2. Click  next to the filter criteria to save this filter.
3. You can use our smart filter name or enter your own name.
4. Click “Save” when finished.
5. This filter will then be available under the “Apply Saved Filter” tab when adding filters.



Adding Saved Filters

To add a Saved Filter on the Patients page:


1. Click “+ Filter Criteria” button.
2. Click the “Apply Saved Filter” tab.
3. Find your desired filter in the list by scrolling or searching.
4. Click “Done” when finished.
5. Saved Filter criteria will be applied to the Patients page.
6. Filter criteria can be removed by clicking on the “X” on the filter criteria button.

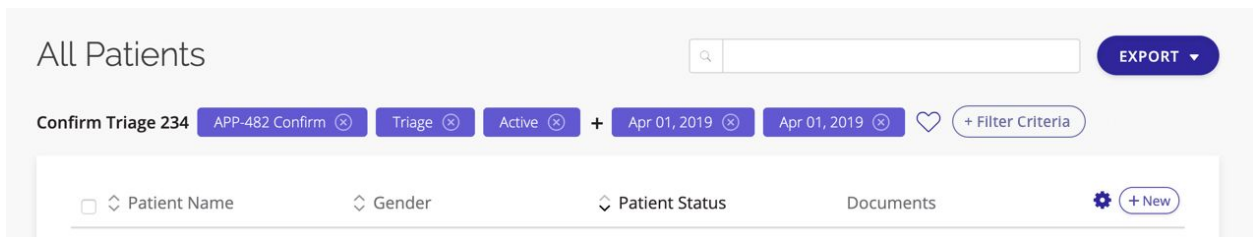


Updating Saved Filters

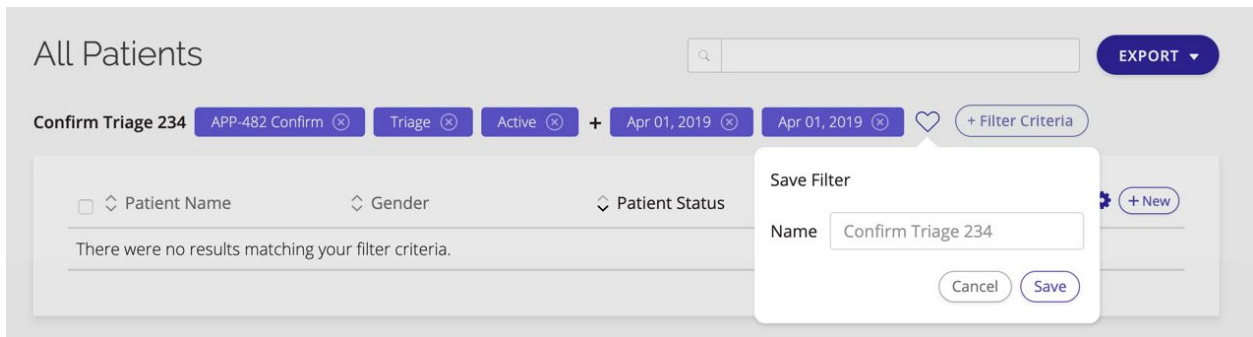
Saved Filters can be updated from the Patients page.

To update a Saved Filter:

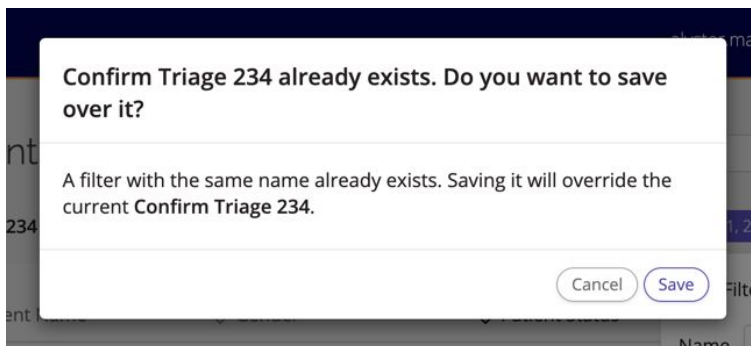
1. Add a Saved Filter by following the steps in Adding Saved Filters.
2. Add or remove filter criteria by following the steps in Adding Filters.
3. Click  next to filter criteria to save this filter.



4. Ensure that you **do not** update the name of the filter.



5. Click "Save". A pop up will appear with a warning that you are about to save over an existing filter. Click "Save".

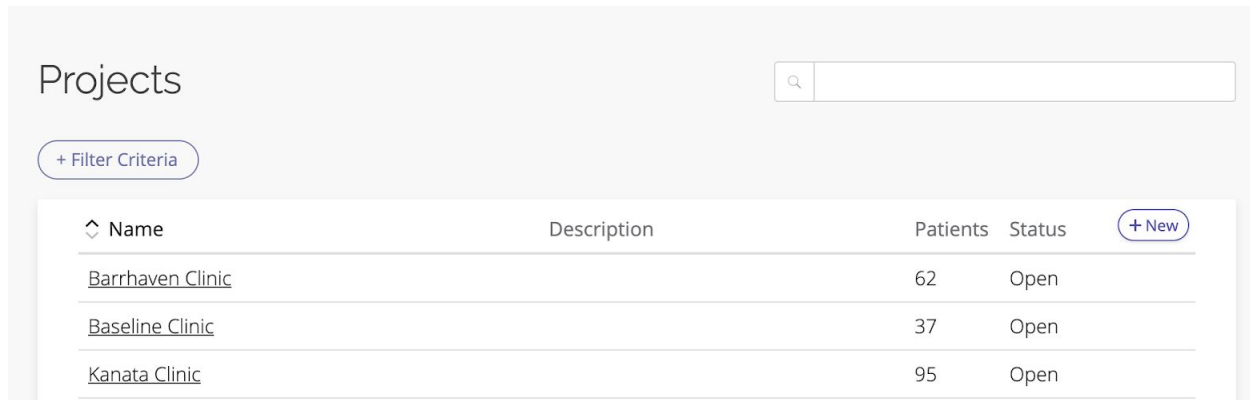


6. Saved Filter will now contain updated filter criteria.

The screenshot shows a web interface for patient management. At the top left, the text "All Patients" is displayed. To its right is a search bar with a magnifying glass icon. Further right is a dark blue button labeled "EXPORT" with a downward arrow. Below the search bar, there is a row of filter buttons: "Confirm Triage 234", "APP-482 Confirm", "Triage", "Active", "Apr 01, 2019", and "Apr 01, 2019". Each of these buttons has a small "x" icon in the top right corner. To the right of these buttons is a heart icon and a button labeled "+ Filter Criteria". Below the filter buttons, there is a horizontal list of column headers: "Patient Name" (with a checkbox and a diamond icon), "Gender" (with a diamond icon), "Patient Status" (with a diamond icon), "Documents", and a gear icon followed by a button labeled "+ New".

Working with Projects

Projects give you the ability to manually organize your patients and their data into groups, and give access to that group to specific users in your organization.

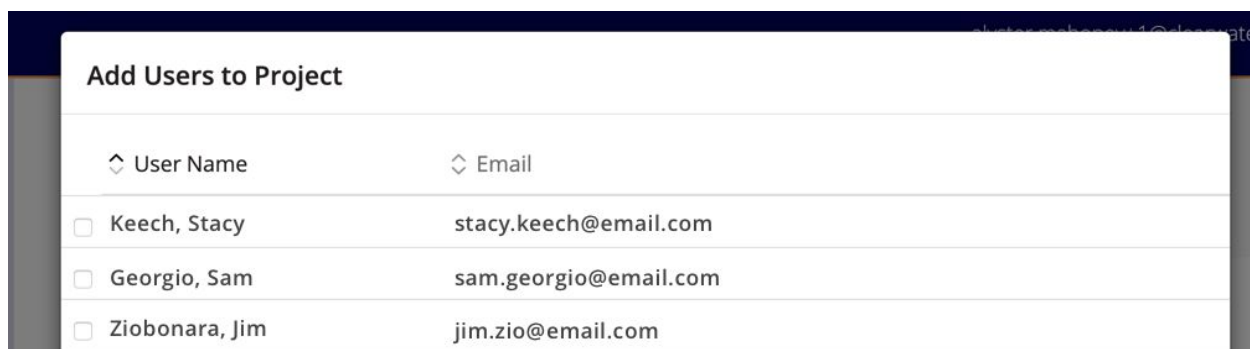


The screenshot shows a web interface titled "Projects". At the top right is a search bar. Below the title is a button labeled "+ Filter Criteria". The main content is a table with the following columns: Name, Description, Patients, Status, and a "+ New" button. The table lists three projects: Barrhaven Clinic (62 patients, Open status), Baseline Clinic (37 patients, Open status), and Kanata Clinic (95 patients, Open status).

◇ Name	Description	Patients	Status	+ New
Barrhaven Clinic		62	Open	
Baseline Clinic		37	Open	
Kanata Clinic		95	Open	

To create a project (DM+):

1. Go to Projects.
2. Click the "New" button.
3. Name your project and add start and end dates if desired.
4. Click "Create".
5. You'll be automatically redirected to the individual project page, and prompted to add additional users to the project (as project creator, you will be added automatically).
 - Users who are part of a project are able to access the project's patients on the SHOEBOS app.
 - These users are also able to add data to the project from the SHOEBOS app by creating and uploading additional patients and test results and activities.
6. When you're done selecting additional users to add, click "Add". If you don't wish to add any additional users to the project, click "Cancel".



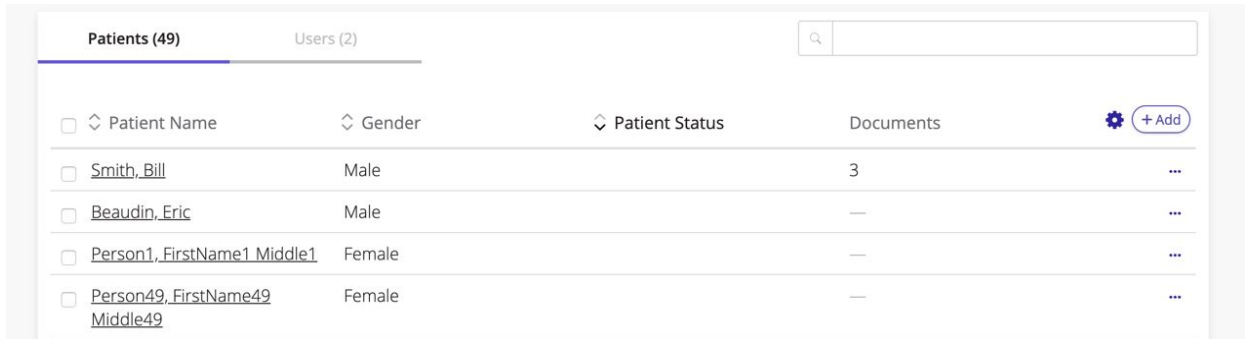
The screenshot shows a dialog box titled "Add Users to Project". It contains a table with two columns: "User Name" and "Email". There are three rows of users, each with a checkbox to its left.

◇ User Name	◇ Email
<input type="checkbox"/> Keech, Stacy	stacy.keech@email.com
<input type="checkbox"/> Georgio, Sam	sam.georgio@email.com
<input type="checkbox"/> Ziobonara, Jim	jim.zio@email.com

You can add patients to a project by importing them (see [Importing Patients](#) for more information), or by adding them manually.

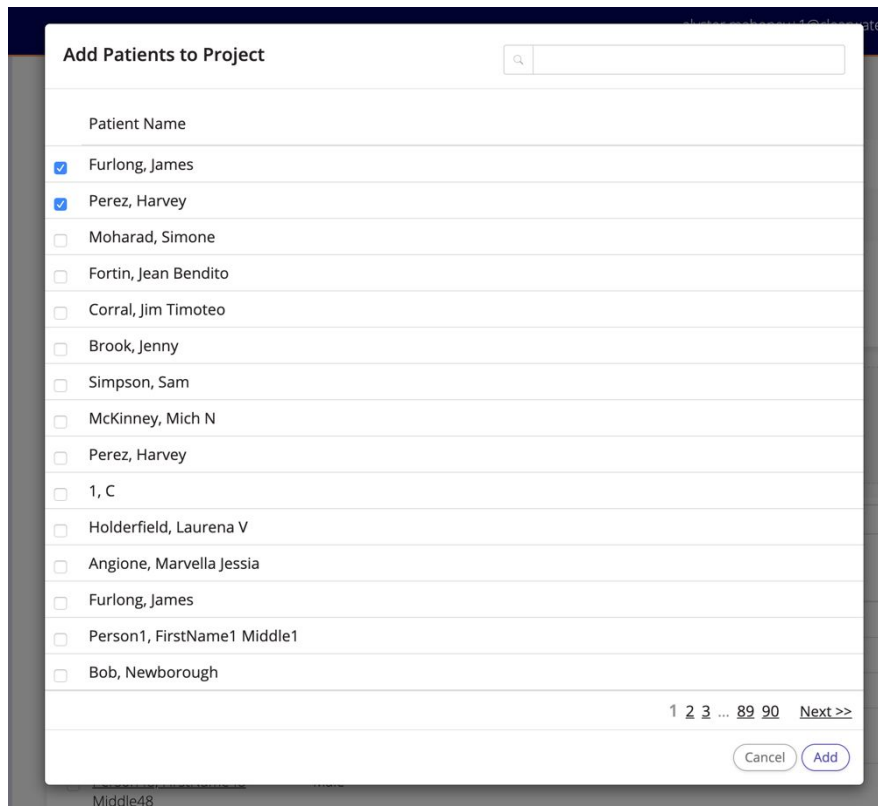
To add patients manually:

1. Select the “Patients” tab in the individual project page.
2. Click the “Add” button.



<input type="checkbox"/> Patient Name	<input type="checkbox"/> Gender	<input type="checkbox"/> Patient Status	Documents	<input type="checkbox"/> + Add
<input type="checkbox"/> Smith, Bill	Male		3	...
<input type="checkbox"/> Beaudin, Eric	Male		—	...
<input type="checkbox"/> Person1, FirstName1 Middle1	Female		—	...
<input type="checkbox"/> Person49, FirstName49 Middle49	Female		—	...

3. Select which patients you would like to add to the project.
4. When you’re done selecting patients to add, click “Add”.



5. You will now see your selected patients in the list under the “Patients” tab.

Working With Reports (DM+)

Different Report Types

Aside from Summary Reports, which are accessed from the Individual Patient Page (see [Getting to Know the Summary Report](#) for more information), we offer a variety of reports from the Reports page.

Roster Report

- Generates a list of all people in the selected project(s).
- Includes patient names, DOB's, last test dates.
- Includes indication of shift status, Brock classification grade, or PTA/AHL (depending on which calculation was selected when the report was generated).

Standard Shift Report

- Generates a list of only the people with shifts or non-zero classification grades.
- Includes patient names, DOB's, last test dates, and more.
- Includes shift / classification grade.
- Provides summary of number of people tested and number of people who experienced a shift or have non-zero classification grade.
- For OSHA reporting, includes all those who have an STS (whether recordable or not).

Recordable Shift Report

- Generates a list of only the people with recordable shifts, as per OSHA regulations.
- Includes patient names, DOB's, project name, last test date.
- Includes calculated shift.
- Provides summary of number of people tested and number of people who experienced a recordable shift.
- Only enabled when OSHA/MSHA are selected in General Settings (see [General Settings](#) section for more information).

Due-for-Testing Report

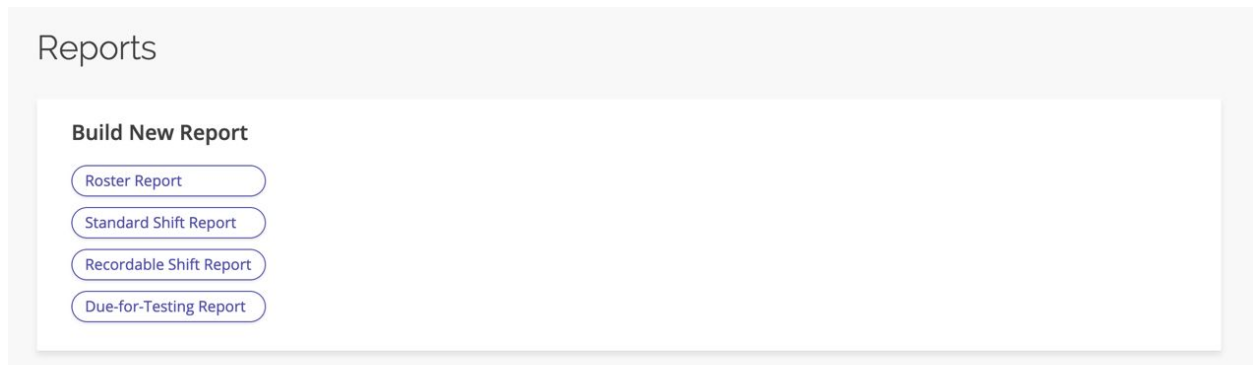
- Generates a list of people who need to be tested within a specified date range.
- Only enabled when Testing Program Rules are set up in General Settings (see [General Settings](#) section for more information).

Building a Report

Reports are built from the Reports page.

To build a report:

1. From the Build New Report section, select which report you would like to generate.



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. *Hint: 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 the Due-for-Testing report).
Note: the contents of this list will depend on your settings. See the [Analysis](#) and [Audiogram History](#) sections for more information on configuring this list.
3. Access Advanced Filter Criteria by clicking on "More Options". For more information on filters, see the [Working With Filters](#) section.
4. Access grouping options by clicking on "More Options". You can choose to group the list of patients or employees in your report by one or two levels of groupings.
 - a. Example: You could group patients or employees first by department, then by job classification.
 - b. Patients or employees would then be organized under the subheadings of their job classifications, and those would be organized under the headings of each department.

Roster Report EXPORT ▾

Filter Criteria Apply

Project: * All Projects ▾

Date Range: Yesterday × ▾

Calculation Standard: AHL ▾

Advanced filters: School ▾ = University of Ottawa × 🗑

Select... ▾ = 🗑

+ Add filter

Grouped first by: Facility × ▾ followed by: Department × ▾

5. Once you have added all your filter criteria, click “Apply” to preview the report.
 - a. This preview includes a summary section of the results as well as a list of the patients / employees who meet the filter criteria you specified.

Saving and Downloading Your Report

1. To save your report, click “Export”. Select which report you would like to save:
 - The Standard/Recordable/Roster/Due-for-Testing Report PDF is a pdf file of the report seen on your screen.
 - The Standard/Recordable /Roster/Due-for-Testing Report CSV is a CSV file of your report results, with added columns for the filters you chose, the Required Action and Action Reason.
 - The Standard/Recordable/Roster/Due-for-Testing & Summary Reports ZIP is a ZIP file that contains a pdf file of the report you see on the screen as well as an individual summary report PDF for each of the patients / employees listed in the report.

Roster Report EXPORT ▾

Filter Criteria


Project: * ABC Company ▾

Date Range: Custom × ▾

From 2018-03-01 × To 2019-03-31 ×










EXPORT ▾


- PDF Roster Report
- CSV Roster Report as CSV
- ZIP Roster & Summary Reports

2. When your report is ready, you can download it in two ways:
 - Directly from the download message pop up window by clicking the  symbol.
 - From the Generated Reports section on the main Reports page.
 - *Tip:* while your report is generating, you can continue other work in the portal. Your report will be downloadable from the Reports page when it's finished generating.

Generated Reports

Reports will no longer be accessible after 30 days.

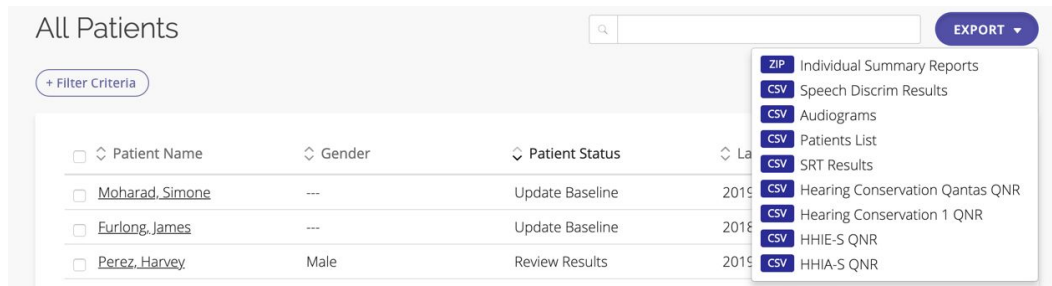
Report Title	Project	Generated on	
Moharad, Simone - Summary Report	---	2019-04-01 1:42 PM	
Moharad, Simone - Summary Report	---	2019-04-01 1:40 PM	
Moharad, Simone - Summary Report	---	2019-04-01 12:08 PM	
Moharad, Simone - Summary Report	---	2019-04-01 12:08 PM	
Furlong, James - Summary Report	---	2019-04-01 11:34 AM	
Roster Report	<u>aaaaa</u>	2019-03-29 11:01 AM	
Corral, Jim - Summary Report	---	2019-01-28 3:25 PM	
Brook, Jenny - Summary Report	---	2019-01-28 12:08 PM	
AdultG1, R3 - Summary Report	---	2018-12-07 2:10 PM	

15 per page 

Exporting your data

Test results can be exported from the Patients page, the Participants page, and an individual project page.

When using search or filters, the export will be based on the search or filter criteria applied at the time of export. Exports are **not affected** by patient selection using checkboxes.



The following export types are available:

ZIP Individual Summary Reports (Patients, Project)

- Generates a ZIP file containing a Summary Report PDF for each patient listed.

CSV Speech Discrim Results (Patients, Project)

- Generates a CSV file containing all speech discrimination results for each patient listed (if applicable).

CSV Audiograms (Patients, Project)

- Generates a CSV file containing all patient audiogram results for each patient listed.

CSV SRT Results (Patients, Project)

- Generates a CSV file containing all Speech Reception Threshold (SRT) results for each patient listed (if applicable).

CSV <name> QNR (Patients, Project)

- Generates a CSV file containing all responses for the specified questionnaire for each patient listed (if applicable).
- Example: CSV HHIA-S QNR is the CSV export for the HHIA-S questionnaire.

CSV QuickTest Results (Participants)

- Generates a CSV file containing all QuickTest results for each participant listed.
Contains:
 - Result category participant was placed in.
 - Participant's hearing level (10dB range) for each frequency tested.
 - User who tested participant.

Settings (DM+)

General Settings

General Settings are system-wide settings.

You can access General Settings by going to Settings > General.

Settings Include:

- Audiogram Display Options (see [Audiogram](#) section for more information).
- Patient Demographics (see [Patient Demographics](#) section for more information).
- Patient Demographics Protection (see [Patient Demographics](#) section for more information).
- Analysis (see [Analysis](#) and [Audiogram History](#) sections for more information).
- Test Program Rules.

Test Program Rules

The test program rules section is used to automatically generate test due dates. Enabling the rules in this section adds a [Due-for-Testing](#) report option to the Reports.

Configuration settings include:

- **Initial Test:** determines the time period in which initial testing must be completed after the hire or creation date of a patient.
 - Enabling and setting values 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, creation date of the patient will be used.
- **Regular Testing:** determines the time period in which regular testing should be conducted for a patient.
 - Enabling and setting values will generate test due dates within a specified period of time after a patient's last test.
 - Values input should reflect the general limit for how long patients can go untested.
- **Retesting:** determines the time period in which re-testing should be conducted for a patient, after their previous test.
 - Enabling and setting values will generate test due dates when patients are flagged as requiring a retest.
 - Test due date will be calculated based on value input in this section.

Test Program Rules

Enabling the rules in this section will result in automatically generated test due dates*. Enabling one or more of the rules below also enables the Due-for-Testing report.

*The next date when the person should be tested.

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.

Report Settings

Report Settings are related to the display and content of your reports.

You can configure:

- Report Header (see [Getting to Know The Summary Report](#) section for more information).
- Summary Report (see [Getting to Know The Summary Report](#) section for more information).
- Report Confirmation.

Report Confirmation

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

Configuration settings include:

- **Subject Confirmation:** when enabled, adds a confirmation tab in the app-generated report that requires confirmation by the subject.
- **Examiner Confirmation:** when enabled, adds a confirmation tab in the app-generated report that requires confirmation by the examiner.

You can choose to input a custom message or use our default message for both the Subject and Examiner confirmation tabs.

Report Confirmation

Subject Confirmation Enable

When enabled, there will be a confirmation tab in the app-generated report that will require confirmation by the subject.

Message

By clicking "I Confirm", you agree that you have been shown your hearing test results. If there are next steps, you have been told how to complete them.

Examiner Confirmation Enable

When enabled, there will be a confirmation tab in the app-generated report that will require confirmation by the examiner.

Message

By clicking "I Agree", you confirm that the test is complete and the results have been shared with the subject who was tested. If next steps are indicated, they have been communicated to the subject.

QuickTest Settings

If you're a QuickTest user, download our QuickTest user guide at shoebox.md/support/shoebox-quicktest for more information on QuickTest Settings.