

SHOEBOX



AUDIOMETRY

Data Management,
Data Management PLUS
User Guide

Table of Contents

Introduction	3
SHOEBOX Data Management and Data Management PLUS (DM+) for Individual Users	4
Portal Login	4
Working With Your Data	5
Manually Importing Audiograms	6
Managing Patients	7
Adding New Patients	7
Editing Patient Information	7
Sorting and Filtering Patients	8
Search	9
SHOEBOX Data Management PLUS for Administrators	10
Managing Users	10
Working With Your Data	10
Sharing Data	10
Projects	11
Adding Users	11
Importing Existing Data	12
Closing Projects	12
Deleting Projects	12
Exporting Data	13
Project Data	13
Test Result Reports	13
Generating Reports	14
Project Reports	14
Patient Reports	14
Symbols Legend	15

SHOEBOX is manufactured by
Clearwater Clinical Ltd.
Suite 501, 1306 Wellington Street West
Ottawa, ON, Canada K1Y 3B2
www.clearwaterclinical.com
1-877-349-9934

SHOEBOX is a Class II medical device listed with
FDA (Registration No: 3007307502)
and Health Canada (License No: 93571).

SB-QMS-727 Rev: I / 2017-09

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 logical groupings (geographies, organizations)	Centrally view the patient / employee data & results synced from the SHOEBBOX iPad device in logical groupings (geographies, organizations)
Flexible search and filter capabilities for viewing data	Flexible search and filter capabilities for viewing data
	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
	Electronic data transfer/export of patient test results
	Define and maintain audiometric baselines for each patient
	Monitoring for threshold shifts for a variety of different regulations/standards
	Comprehensive reports including: <ul style="list-style-type: none"> • Individual patient summary reports • Clinical hearing threshold shift reports (CTCAE) • Employee/patient roster reports • Hearing conservation shift reports
	Administrative control for assigning user access across projects.

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

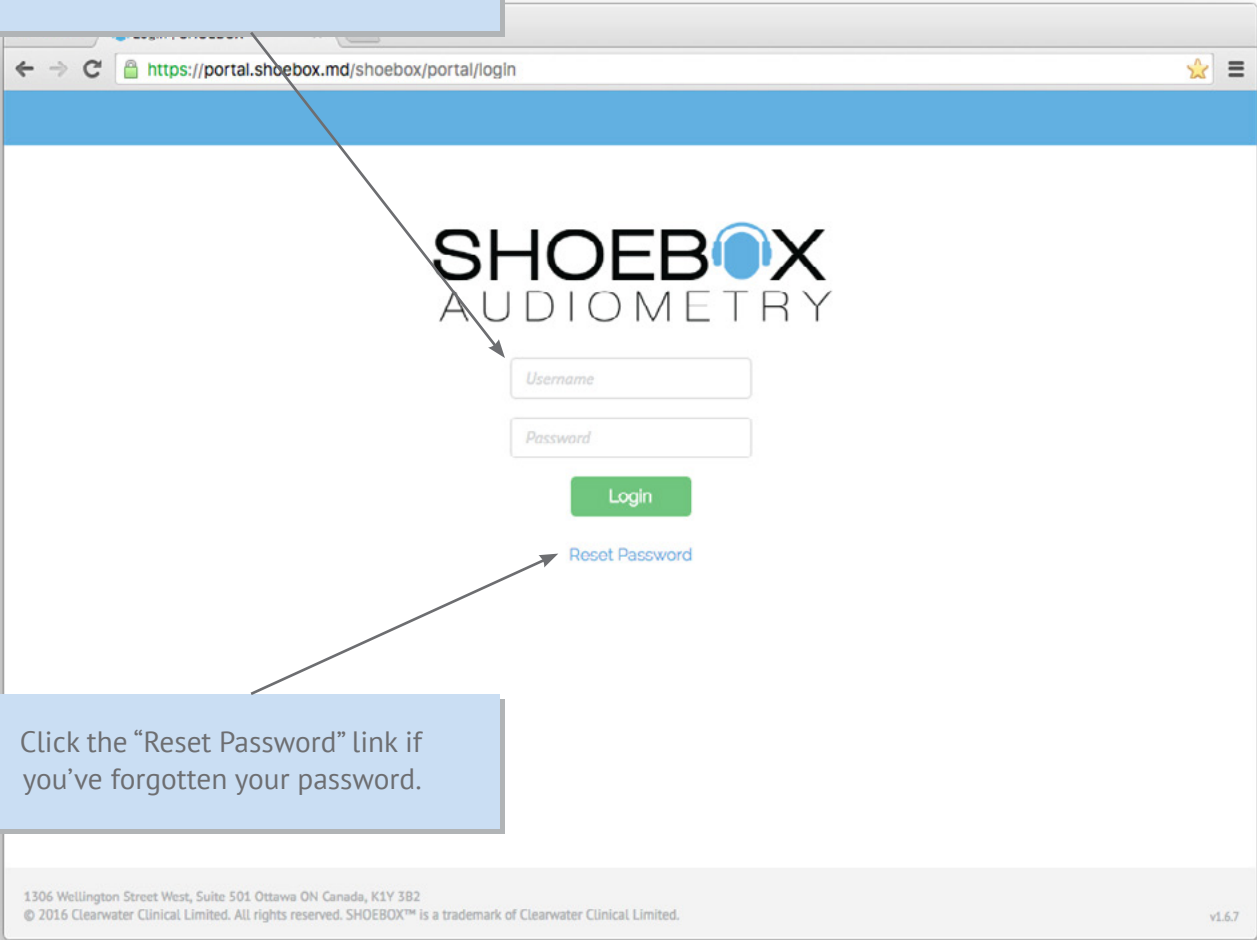
Portal Login

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 "Reset 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 username and password then click "Login" to get started!



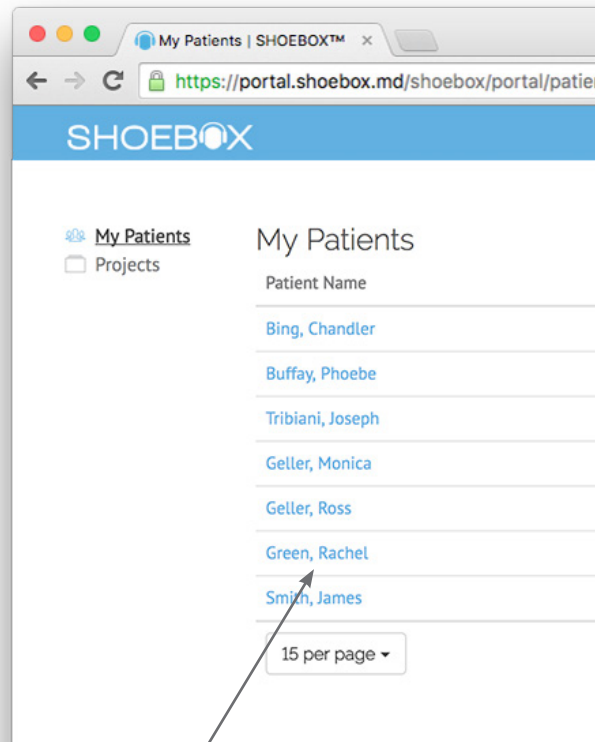
Click the "Reset Password" link if you've forgotten your password.

Working With Your Data

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

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

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



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

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

3 Click to view / download audiogram

Audiogram Summary New Audiogram

Date	Time	LB	Left Thresholds (dB HL)							RB	Right Thresholds (dB HL)							AHL (2K, 3K, 4K)		
			500	1K	2K	3K	4K	6K	8K		500	1K	2K	3K	4K	6K	8K	Left	Right	
2016-09-21	18:22	<input type="checkbox"/>	20	20	20	20	20	20	20	<input type="checkbox"/>	20	20	20	20	20	20	20	20.0	20.0	...
2000-07-13	09:46	<input checked="" type="checkbox"/>	16	16	16	16	16	16	16	<input checked="" type="checkbox"/>	16	16	16	16	16	16	16.0	16.0	View	
1995-11-22	07:43	<input type="checkbox"/>	15	15	15	15	15	15	15	<input type="checkbox"/>	15	15	15	15	15	15	15.0	15.0	Delete	
																			Download	

Manually Importing Audiograms

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

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

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

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

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

New Audiogram

Test Date: 2017-09-21
Test Time: 12:30 pm
Examiner:

Transducer Model:
Transducer Serial:

Audiometer Model:
Audiometer Serial:
Calibration Date: 2017-09-20

Include Extended High Frequencies

Air

Right Ear

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

Notes:

Mark as Baseline

Left Ear

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

Notes:

Mark as Baseline

Managing Patients

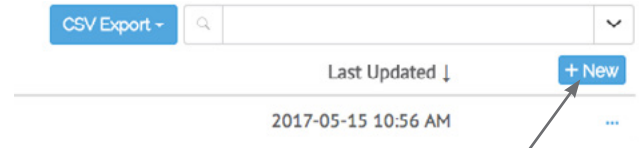
Editing Patient Information

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

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

Adding New Patients (DM+)

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 “*”.

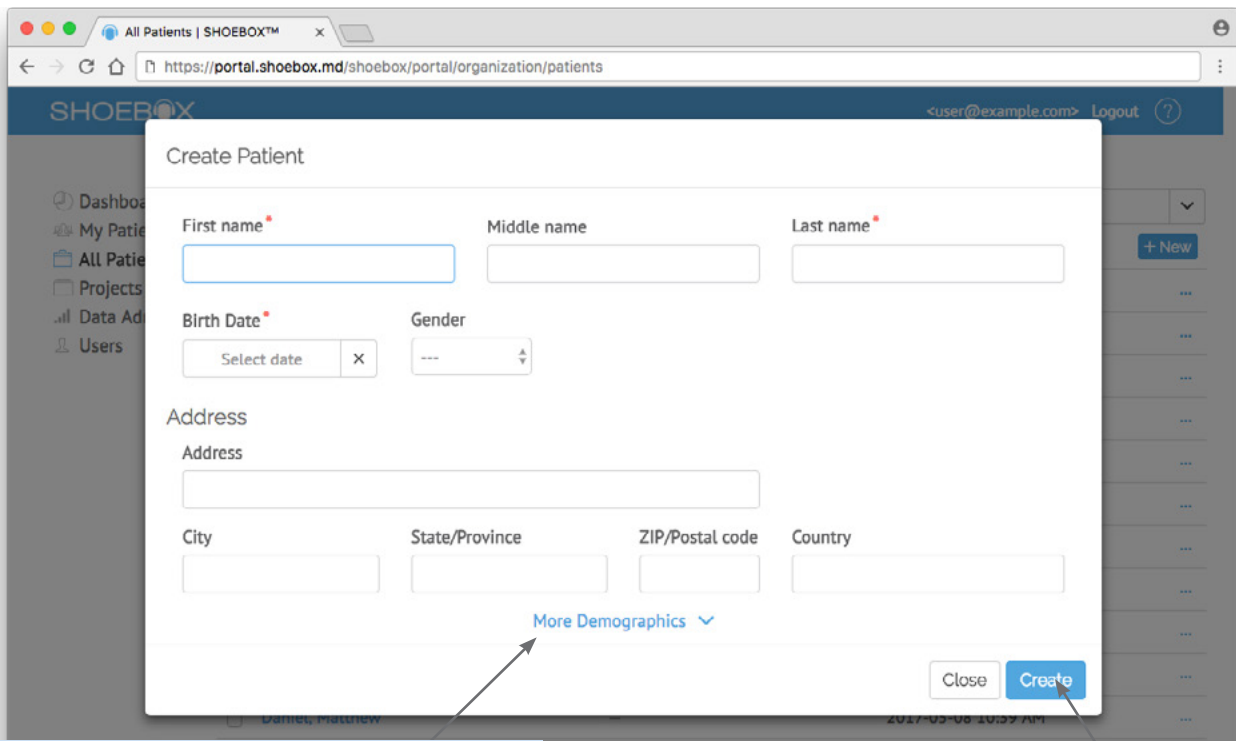


Click the “New” button to create a new patient

Did You Know?

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

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



Access more input fields by clicking “More Demographics”

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

Sorting and Filtering Patients

To change what information you see on the “My Patients” or “All Patients” pages, click the “Settings” icon next to the “New” button. 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 displayed patient data, click the “Settings” icon to close the settings.

You can choose to sort the patient list by any of the four columns. Patients will be sorted alphabetically by last name by default. Simply click on the column you wish to sort by and a blue arrow will appear indicating the sort order. You can sort by either ascending or descending order.

The screenshot shows the 'My Patients' interface. At the top, there are navigation tabs for 'My Patients' and 'Projects'. Below the tabs, there is a search bar and a settings icon. The main content area displays a table with four columns: 'Patient Name', 'Documents', 'Last Updated', and 'Birth Date'. The 'Last Updated' column is currently sorted in ascending order, indicated by a blue upward arrow. A '+ New' button is located at the bottom right of the table. Two callout boxes provide instructions: one points to the 'Documents' dropdown menu with the text 'Select from the drop down to configure a column', and another points to the settings gear icon with the text 'Click the “Settings” icon to open or close the column configuration'.

Patient Name	Documents	Last Updated ↑	Birth Date
Baum, Adam A	2	2017-07-27 9:07 PM	1994-03-03
Board, Bill	2	2017-07-27 9:07 PM	1994-03-03
Bacon, Chris P	2	2017-07-27 9:07 PM	1994-03-03
Druff, Dan	2	2017-07-27 9:07 PM	1994-03-03
Pickles, Dilbert	2	2017-07-27 9:07 PM	1994-03-03
Riser, Earl Lee	2	2017-07-27 9:07 PM	1994-03-03
Vader, Ella	2	2017-07-27 9:07 PM	1994-03-03
Green, Forrest	2	2017-07-27 9:07 PM	1994-03-03
Morris, Hugh	2	2017-07-27 9:07 PM	1994-03-03
Pond, Lily	2	2017-07-27 9:07 PM	1994-03-03
Power, Max	2	2017-07-27 9:07 PM	1994-03-03
Yew, Olive	2	2017-07-27 9:07 PM	1994-03-03
Banks, Robin	2	2017-07-27 9:07 PM	1994-03-03
Bellum, Sarah	2	2017-07-27 9:07 PM	1994-03-03
Cupp, Stanley	2	2017-07-27 9:07 PM	1994-03-03

Search

If you need to find a specific patient quickly, you can type their name in the search box on the upper right hand side of the My Patients or All Patients page. You can also use this search box to view only patients within a particular project. To do this, click the down arrow beside the search bar and select a project.

Did You Know?

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

Logout

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

The screenshot shows the SHOEBOX web application interface. The top navigation bar includes the SHOEBOX logo, a user profile icon with the email <user@example.com>, and a Logout button. A sidebar on the left contains navigation links: Dashboard, My Patients, All Patients, Projects, Data Admin, Users, and QuickTest. The main content area is titled "All Patients" and features a search bar with the text "Name: Chris" and a dropdown arrow. Below the search bar is a table with columns for Patient Name, Documents, and Last Updated. The table lists two patients: Chris Nell (1 document, updated 2017-04-10 4:49 PM) and Russell, Chris (2 documents, updated 2016-12-19 2:02 PM). A "+ New" button is located at the end of the table. A "15 per page" dropdown is visible below the table. Two callout boxes provide instructions: one points to the search bar with the text "Enter patient name or use dropdown to select a project." and another points to the "Name: Chris" search criteria with the text "Click to remove patient name search criteria."

Patient Name	Documents	Last Updated ↓	
<input type="checkbox"/> Chris Nell	1	2017-04-10 4:49 PM	...
<input type="checkbox"/> Russell, Chris	2	2016-12-19 2:02 PM	...

SHOEBBOX 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.

Need New Users?

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

To add new users to your organization contact support@shoebox.md from the email account used to log into your SHOEBBOX administrator account.

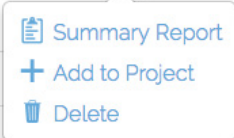
Managing Users

All users in your organization will be listed in the “Users” section and from here you can view individual users’ data as well as perform user related tasks.

If one of your users has forgotten their password, you can request that a password reset email be sent to them. Do this by clicking the “Reset Password” action beside the user’s name. If you need to disable a user’s account, click the “Disable” action beside their name.

Working With Your Data

In addition to the standard data management functionality available to all users (see ‘Individual Users’ section), administrative users are able to delete patients and change their associated project. Open the action menu at the right of the patient item to access these options. To complete these actions for a group of patients, simply use the checkbox beside the patient name to select multiple patients before selecting the action from the action menu.

2017-09-06 6:50 PM	...
2017-09-06 4:37 PM	...
2017-09-06 4:24 PM	 Summary Report + Add to Project Delete
2017-09-05 10:36 AM	
2017-08-14 1:51 PM	
2017-08-12 6:41 AM	...
2017-08-12 6:32 AM	...
2017-08-12 6:02 AM	...

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.

Projects

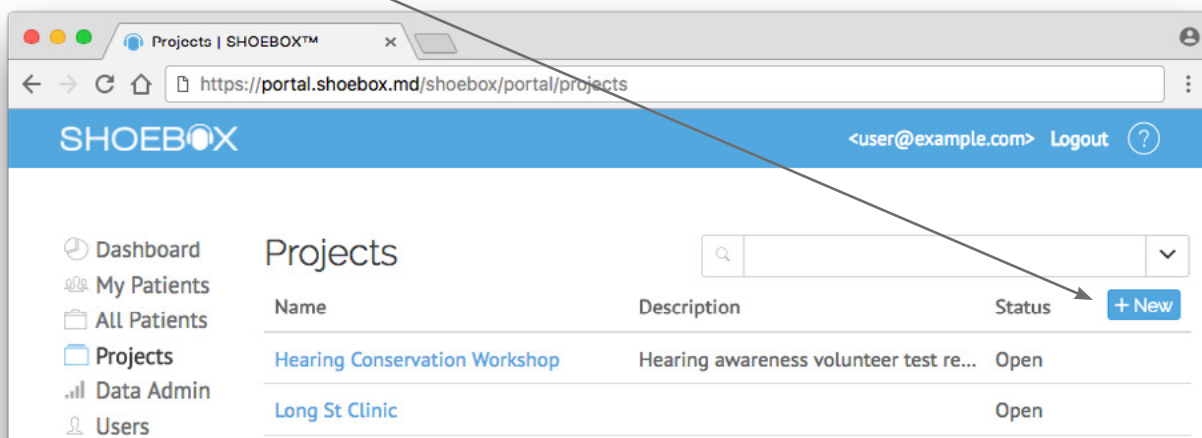
The “Projects” section gives you the ability to organize your patients and data into relevant groups. To create a new project, select the “+ New” button at the top of the screen and fill in the information requested. The start and end dates can be estimates and are not enforced.

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

Tips For Creating Projects

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

Clinic Locations
Patient Demographics
Patient Referral Status
Special Events



Adding Users

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

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

Add Users to Project

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

Cancel Add

Importing Existing Data

If you would like to import patients or audiograms from an existing system, you can do so by clicking the + icon to open the upload window or dragging a properly formatted CSV file onto the project import box. Files must be less than 10MB and conform to the SHOEBBOX CSV formatting guidelines (visit www.shoebox.md/support to download a template csv file).

⊕ 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](#))

If the default date format doesn't match your CSV, you can change the import date format by clicking the "Change Date Format" link prior to selecting your CSV file.

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

Closing Projects

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

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

Deleting Projects

Only closed projects can be deleted. To delete a closed project, go to the individual project page and click the "Edit" icon in the top right corner of the "Project Details" section to access the "Delete" button. If your project is still open, you will need to close it before the "Delete" button becomes visible. In the SHOEBBOX program, users are no longer able to access and upload data to deleted projects.

The screenshot shows the 'Project Details' form for a project named 'Long St Clinic'. The form includes fields for Name, Description, Start Date, and End Date. The 'Status' dropdown menu is currently set to 'Closed'. In the top right corner of the form, there are three buttons: 'Delete' (highlighted with a red circle), 'Cancel', and 'Save'. An 'Export' button is also visible in the top right corner of the overall interface.

Exporting Data

Project Data

Once you've selected a project, you can quickly and easily export project data by selecting the "Export" button at the top of the screen. From here you'll be able to select an export option:

Export Audiograms (ZIP)

This option allows you to export all patient audiograms that are associated with the selected project as individual PDF files.

Export QuickTest Data CSV

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

Test Result Reports

From the 'All Patients' section, test results in the user portal can be exported as a single .csv file containing all results of the selected test type. The export action is for the entire collection of patients and is not affected by search criteria or patient selection.

Export Speech Results CSV

This option generates a CSV file containing all patient speech results in the portal.

Export Surveys CSV (Currently Hearing Handicap Inventory)

This option generates a CSV file containing all patient questionnaire results in the portal.

Export Audiograms CSV

This option generates a CSV file containing all patient audiogram results in the portal.

Export Patients List CSV

This option generates a CSV file containing all patient and demographic data in the portal.

<input type="checkbox"/>	Patient Name ↑	Documents	Birth Date	⚙️ + New
<input type="checkbox"/>	Cobb, Jayne V	2	1986-01-14	⋮
<input type="checkbox"/>	Cobb, Jayne	1	1981-01-15	⋮
<input type="checkbox"/>	Concepcion, Dondi	4	2017-04-08	⋮
<input type="checkbox"/>	Cook, John	3	1999-09-16	⋮
<input type="checkbox"/>	Coronel, Aries	-	1940-01-01	⋮
<input type="checkbox"/>	Cruz, Mike Dela	-	1940-01-01	⋮
<input type="checkbox"/>	Cruz, Romeo Sta	-	1940-01-01	⋮
<input type="checkbox"/>	Cummins, Sam	1	2012-11-02	⋮

Generating Reports

Project Reports

From the “Reports” page, you can build a PDF report based on project data.

Customizing Your Report

You can configure your report header logo and text in the “Report Header” section. The report header will appear on every page of your report.

Select your report type:

Employee Roster Report (PDF)

This report generates a PDF listing of all patients in the project, their last test date and an indication of whether or not a significant shift occurred.

Shift Report (PDF)

This report generates a PDF listing of all patients in the project with shifts, their last test date and the shift.

Then, select the project and shift standard. When you’ve finished setting your report data, click the “Build” button to build and download your report.

Patient Reports

To generate a summary report for a single patient, navigate to a single patient page and click the “Summary Report” button.

The screenshot shows the 'Reports' interface with the following components and callouts:

- Report Builder:** Contains a 'Cancel' button and a 'Build' button.
- 1. Select Report Type:** A callout box points to the 'Roster Report' and 'Shift Report' buttons, stating: "Select Report Type and enter Report details to create a new report".
- 2. Filter Data:** A callout box points to the 'Project', 'Updated Between', and 'Shift Type' fields, stating: "Specify the test date range, project, or leave blank".
- Report Header:** A callout box points to the 'No Report Header Logo' and 'No Header Text Set' text, stating: "Set / Edit your report header logo and text by clicking the “Edit” icon".

Symbols Legend

Audiogram Threshold Symbols:

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

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		Did not hear a sound		New Patient
	Patient Information		Upload to web portal		Notes
	Add Item / Create New		Reorder Item		Warning