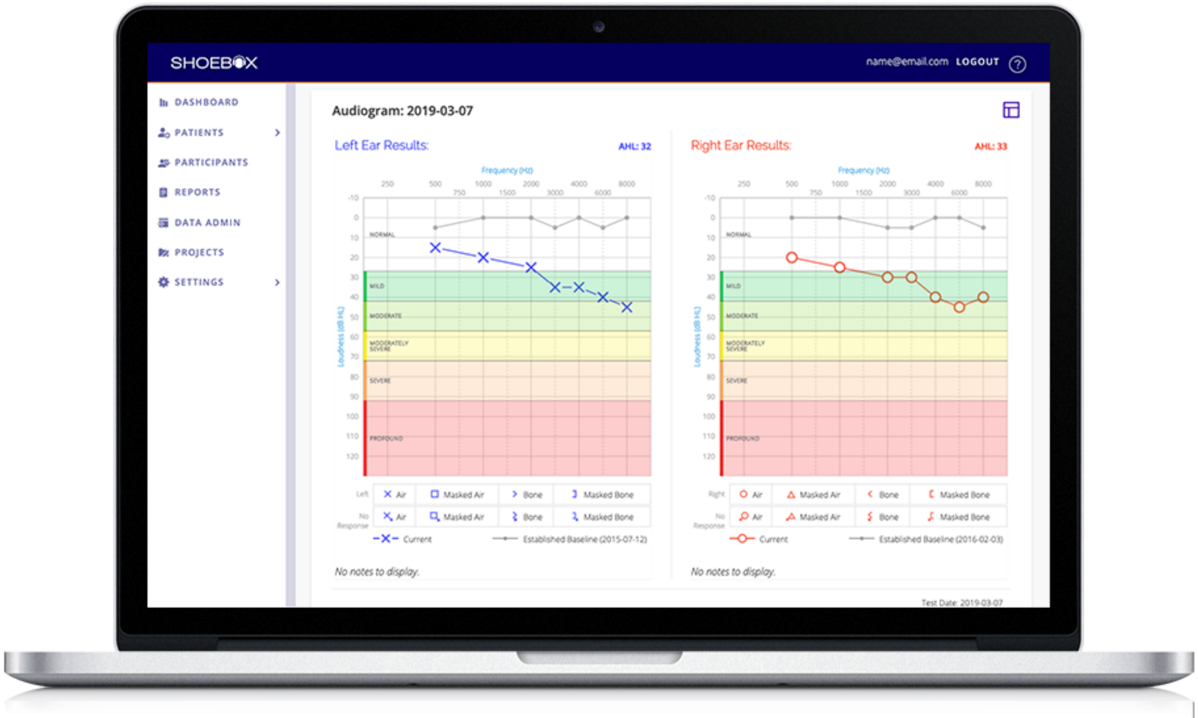

SHOEBOX Data Management and Data Management PLUS

User Guide

Think Outside of the Booth!™

Introduction

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

SHOEBOX Data Management is a secure, cloud-based web portal that offers a convenient way to store and analyse patient and audiogram information captured in SHOEBOX. 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 SHOEBOX Data Management and Data Management PLUS (DM+).

If your iPad was provided by SHOEBOX, 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 SHOEBOX device in one complete list	Centrally view patient/employee data & results synced from the SHOEBOX 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 SHOEBOX 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: ● 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

	• Batched ZIP reports • Due-for-Testing reports
	Administrative control for assigning user access across projects

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ISO
13485:2016
Medical Device
Quality
Management

Contents

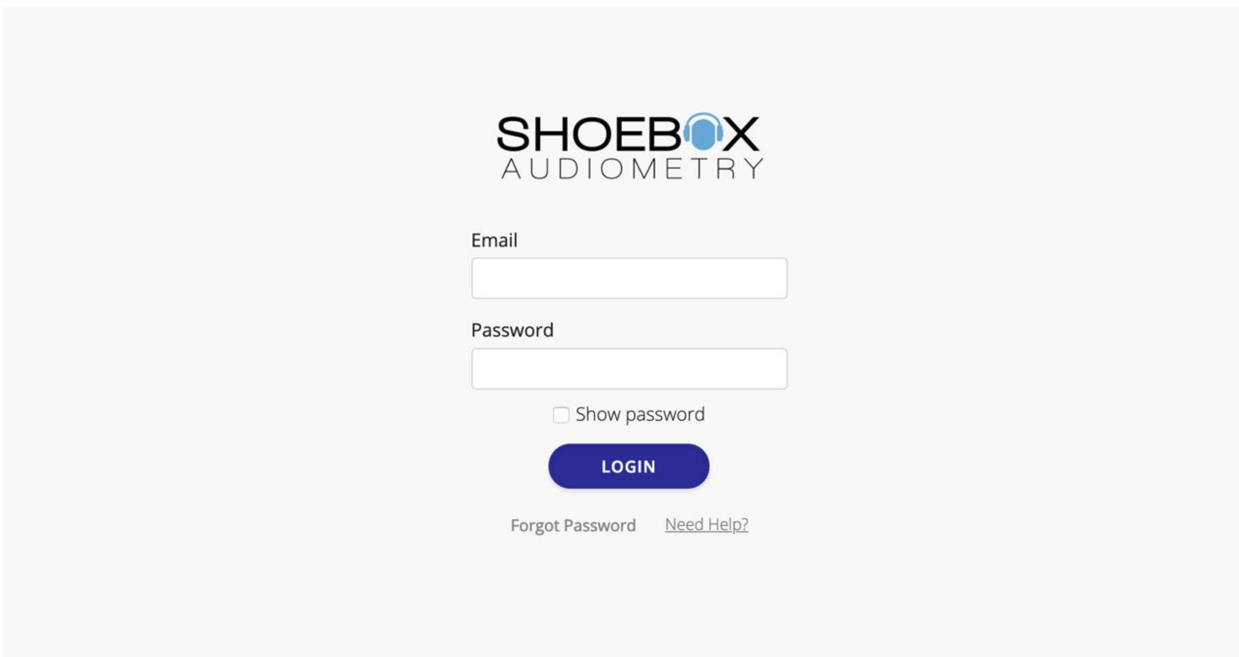
Getting Set Up

Logging in

To log in to the SHOEBOX 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 SHOEBOX 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 SHOEBOX or QuickTest. If you don't know what these are, contact support@shoebox.md.



Forgot your password?

Click the "Forgot Password" link on the login screen and enter the email associated with your SHOEBOX 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 SHOEBOX 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

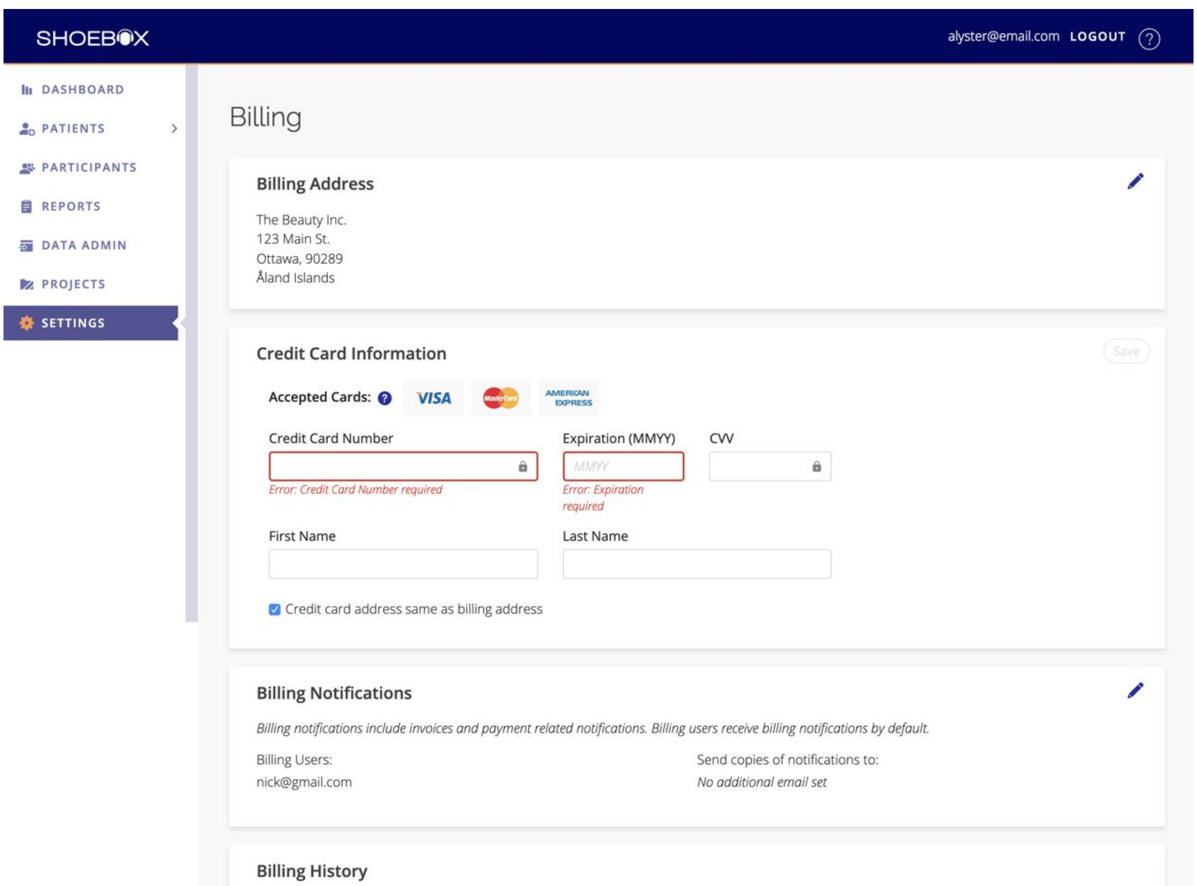
General
Configure test frequencies, tone levels, welcome screen, accent colour, and privacy statement.

Billing

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

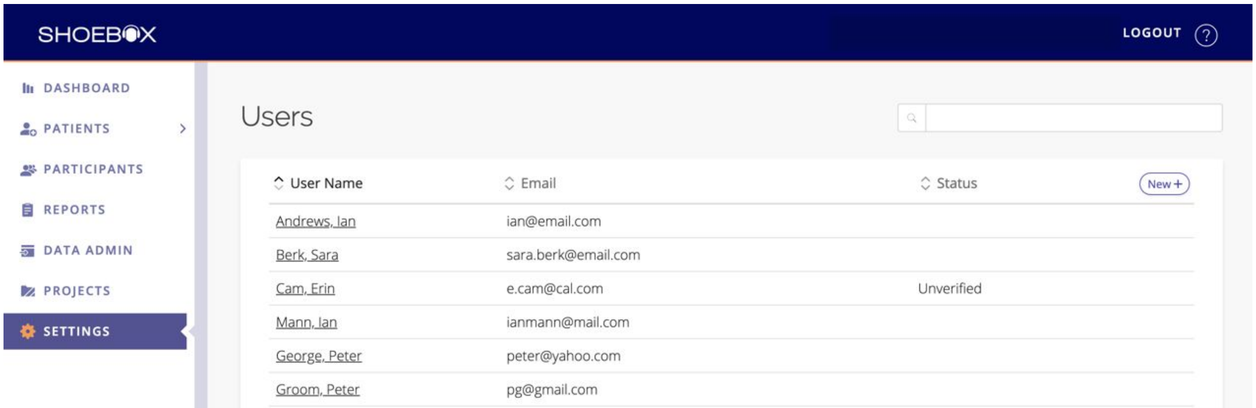
Account billing details are managed on an organizational basis. Your organization may be set up to pay by credit card, or to pay by invoice. Depending on your payment method, you'll see the following sections:

- 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.



Managing Users (DM+)

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



To add a new user:

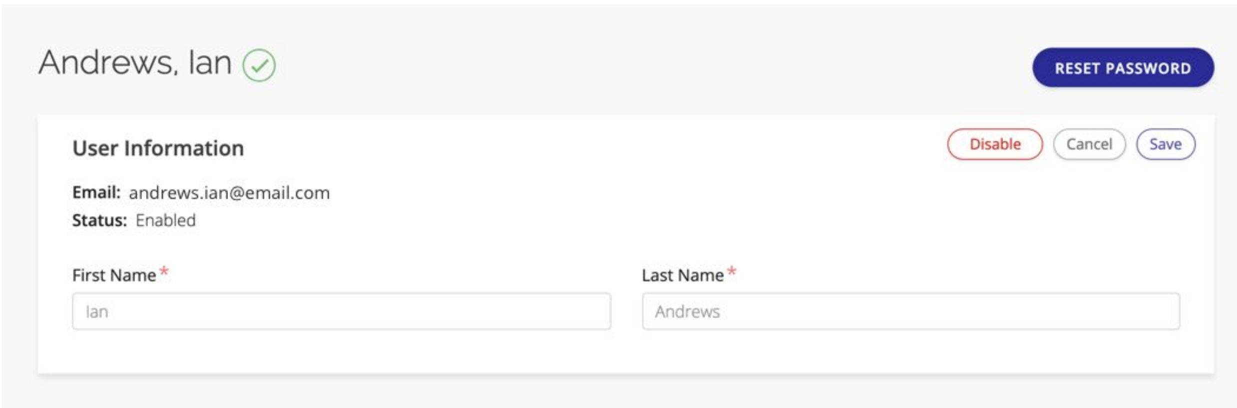
1. Click the "New" button.
2. Add the user's name and email address.
3. Click "Create".

   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 SHOEBOX 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".



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 SHOEBOX 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.

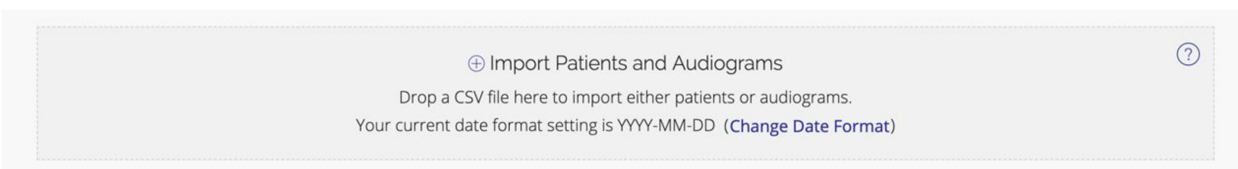
You have two options for importing data:

1. Import data globally to SHOEBOX.
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 SHOEBOX 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 SHOEBOX, you will not see Patients.

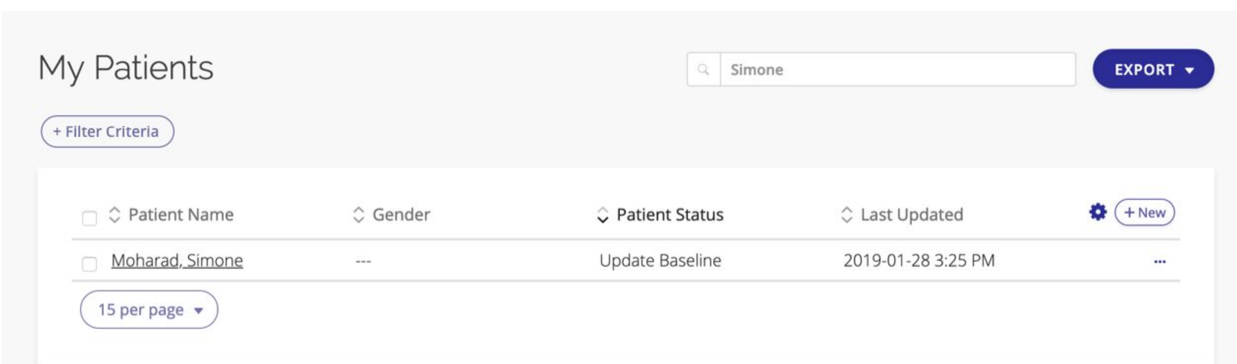
Find an Existing Patient (Imported or SHOEBOX Created), or Participant (QuickTest Created)

Any patients that have been imported (see Importing Patients & Audiograms for more information) or created in SHOEBOX 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.



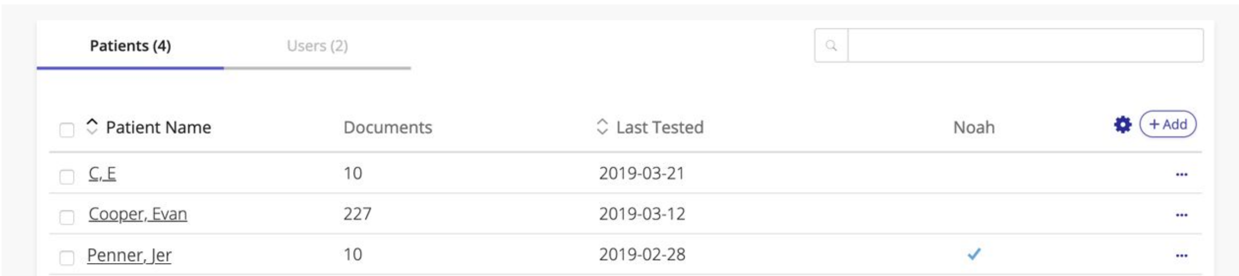
You can search for a specific patient by typing their name or Employee ID in the search box on the upper right hand side of the Patients page.

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 SHOEBOX, 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.

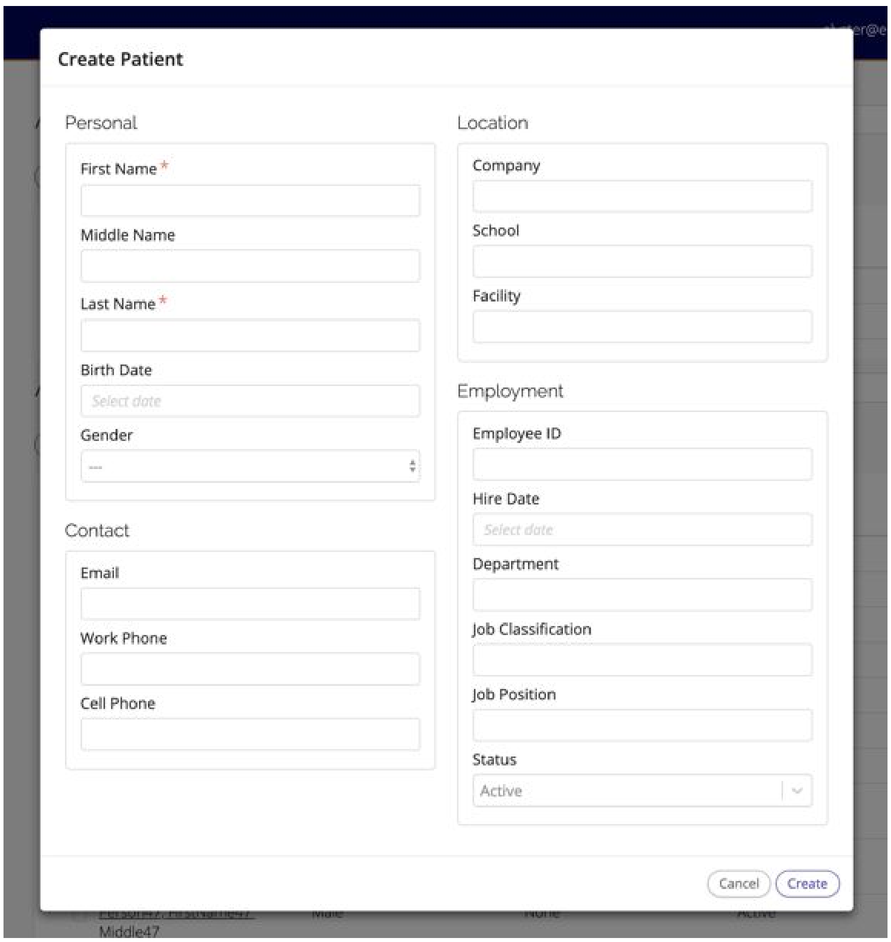


Create a New Patient (DM+)

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.



Patient and Participant List Display Options

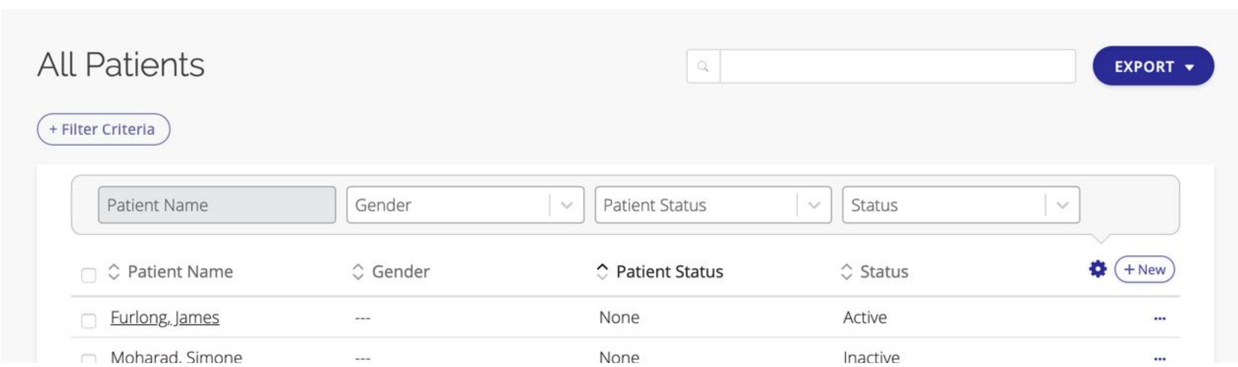
You can change which columns are displayed on the Patients and Participants pages, as well as sort the patient or participant list by any of the four columns (provided they contain sortable data).

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.

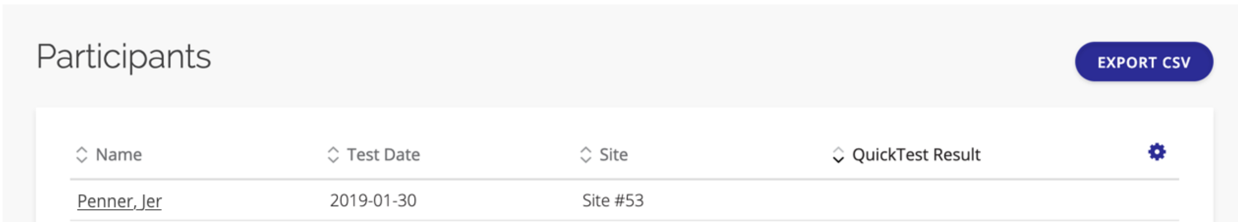
To sort the patient or participant list:

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.

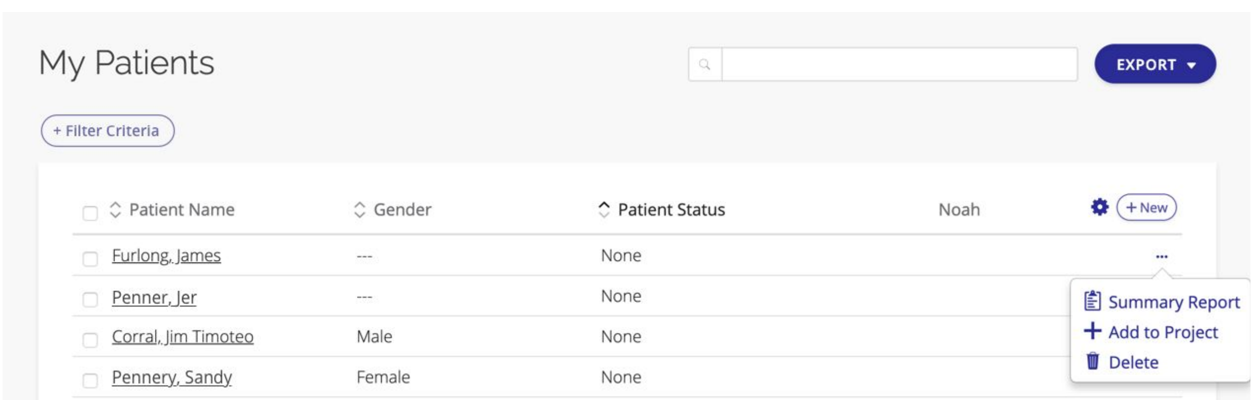


Patient and Participant List Actions

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.

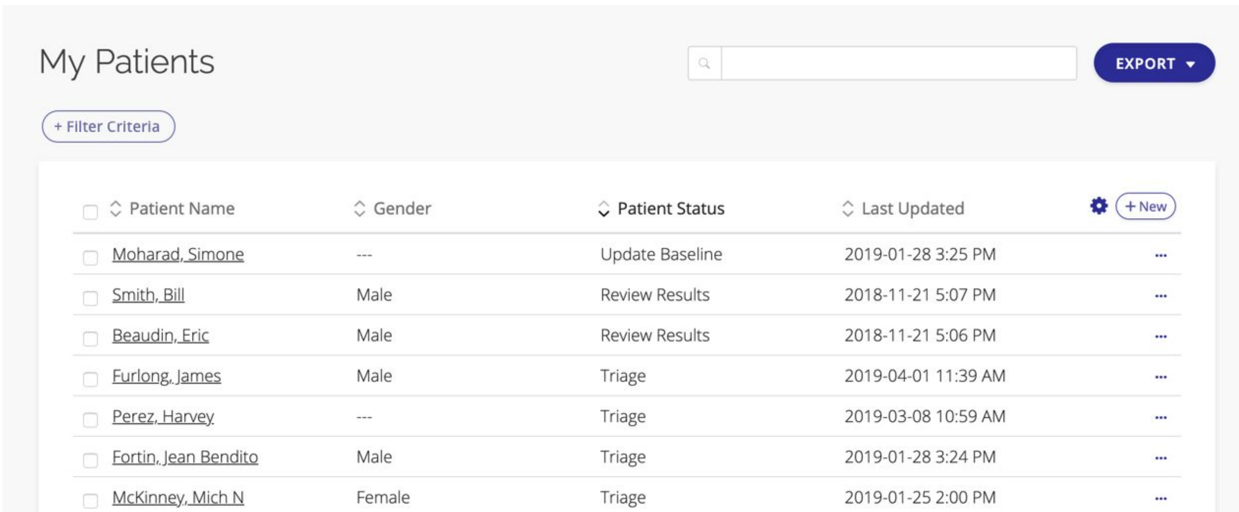


**For more information on summary reports, see [Getting to Know the Summary Report](#).*

From the Participants page, you can delete a participant.

Working With Individual Patient Data

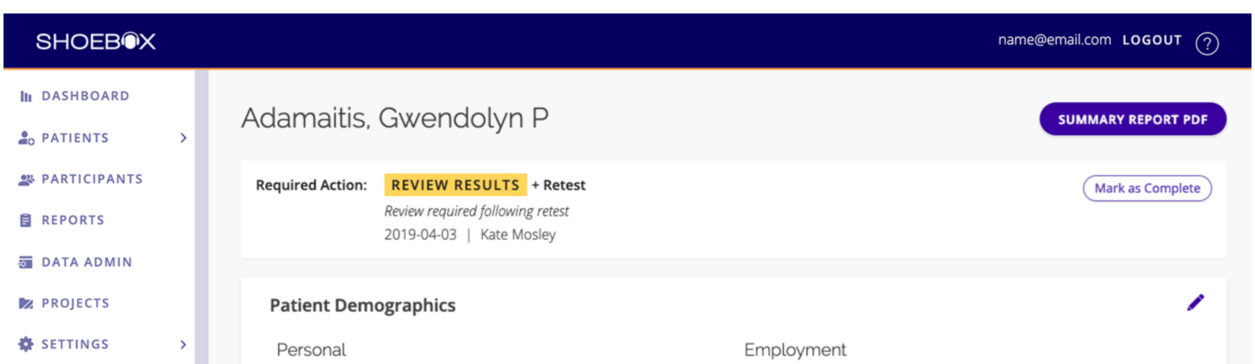
If you're responsible for reviewing patient test results on an individual basis, you can access them by clicking on a patient's name in the list on the Patients page.



Getting to Know the Individual Patient Page

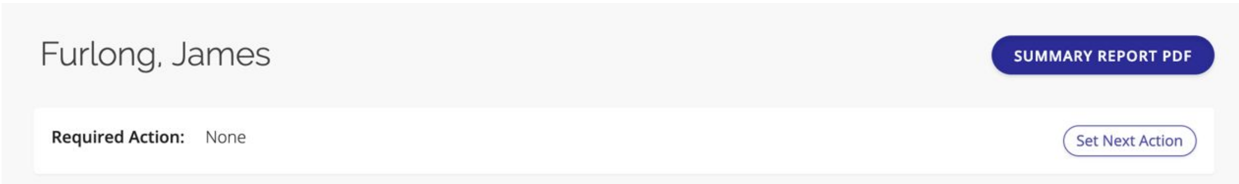
The Individual Patient page contains several sections. What you'll see is dependent on what tests and activities have been performed.

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.



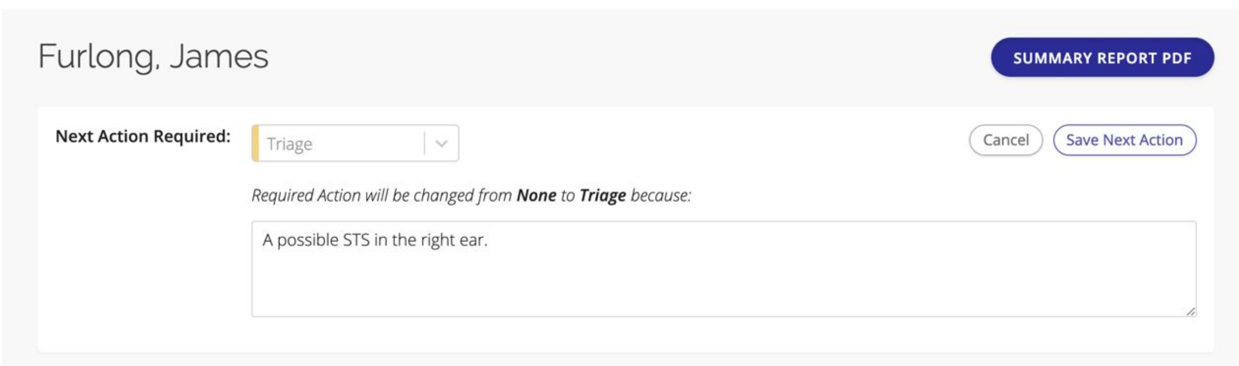
Required Action

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



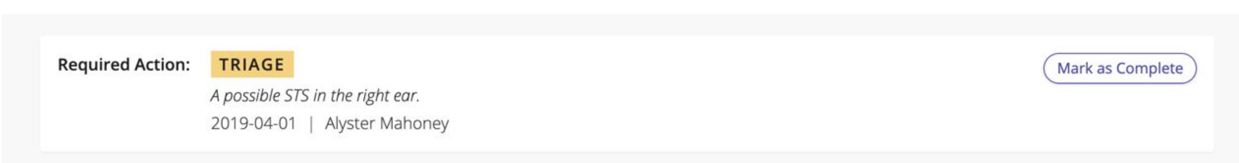
To set a required action for a patient:

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.



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”.

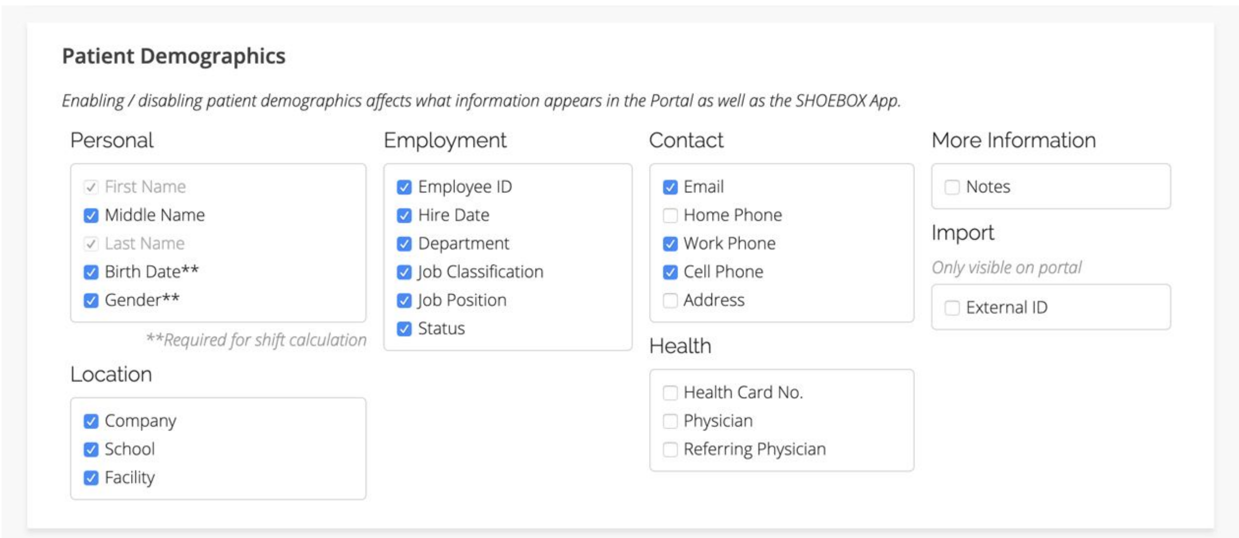


Patient Demographics

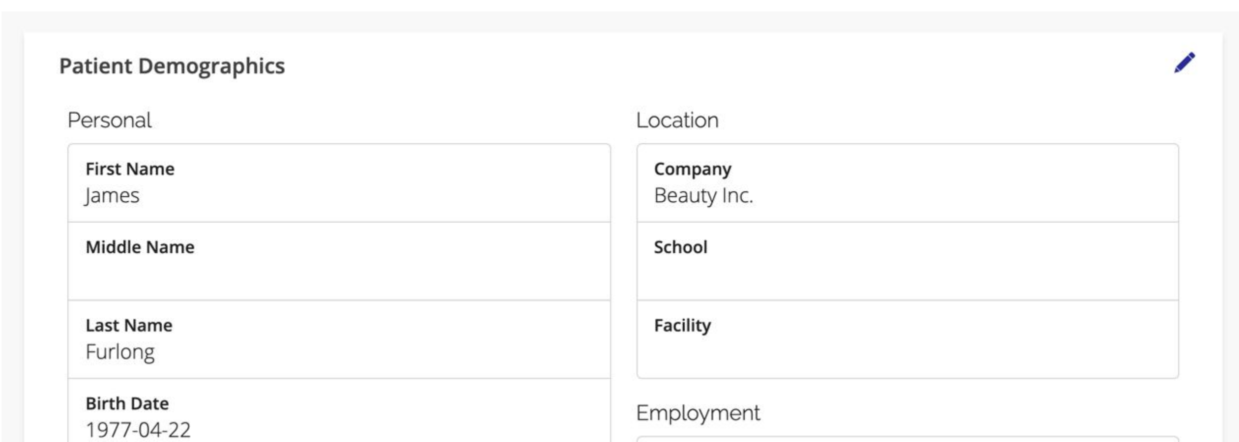
This section contains information like patient name, birthdate, gender, contact information, employee information, etc.

To configure which fields appear in this section:

1. Go to Settings > SHOEBOX > 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 SHOEBOX app.
4. Click "Save" in the top right hand corner to save your changes.

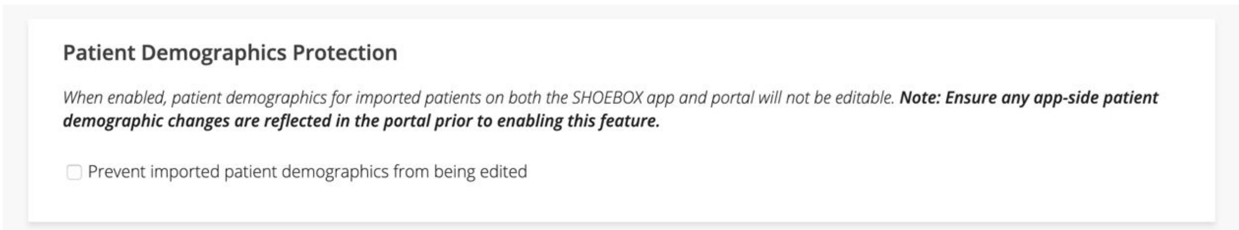


To edit patient demographics, click in the top right hand corner of the Patient Demographics section.



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

1. Go to Settings > SHOEBOX > 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.

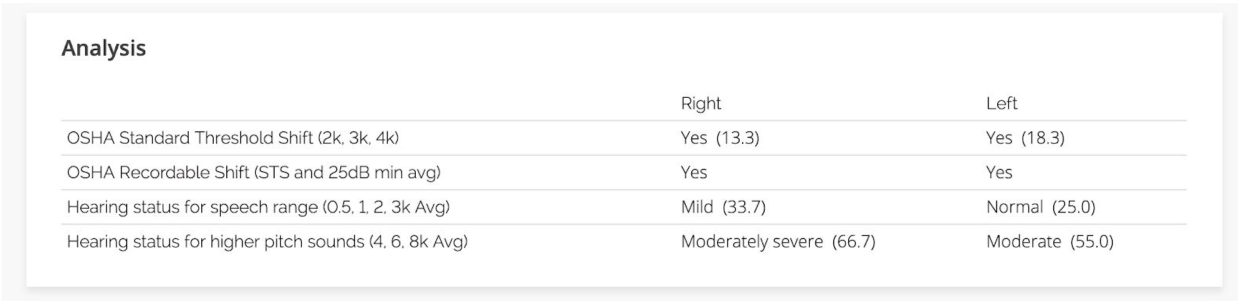


Users with Noah integration should note that regardless of enabling Patient Demographic Protection, Noah imported patients cannot be edited in the web portal or the SHOEBOX app.

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.

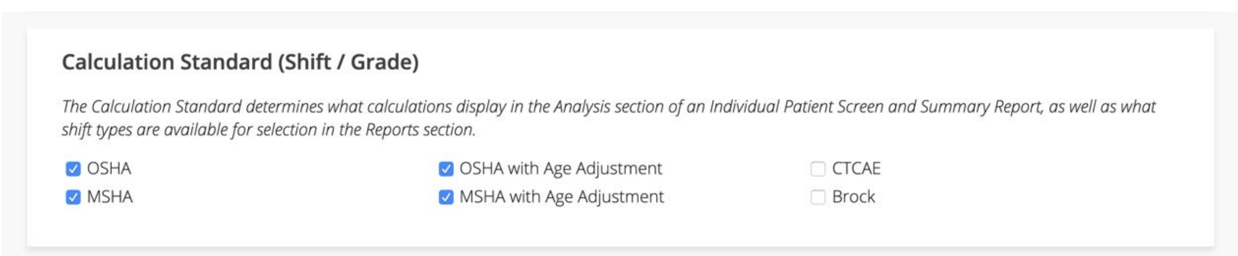


Analysis

	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 > SHOEBOX > 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.



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.

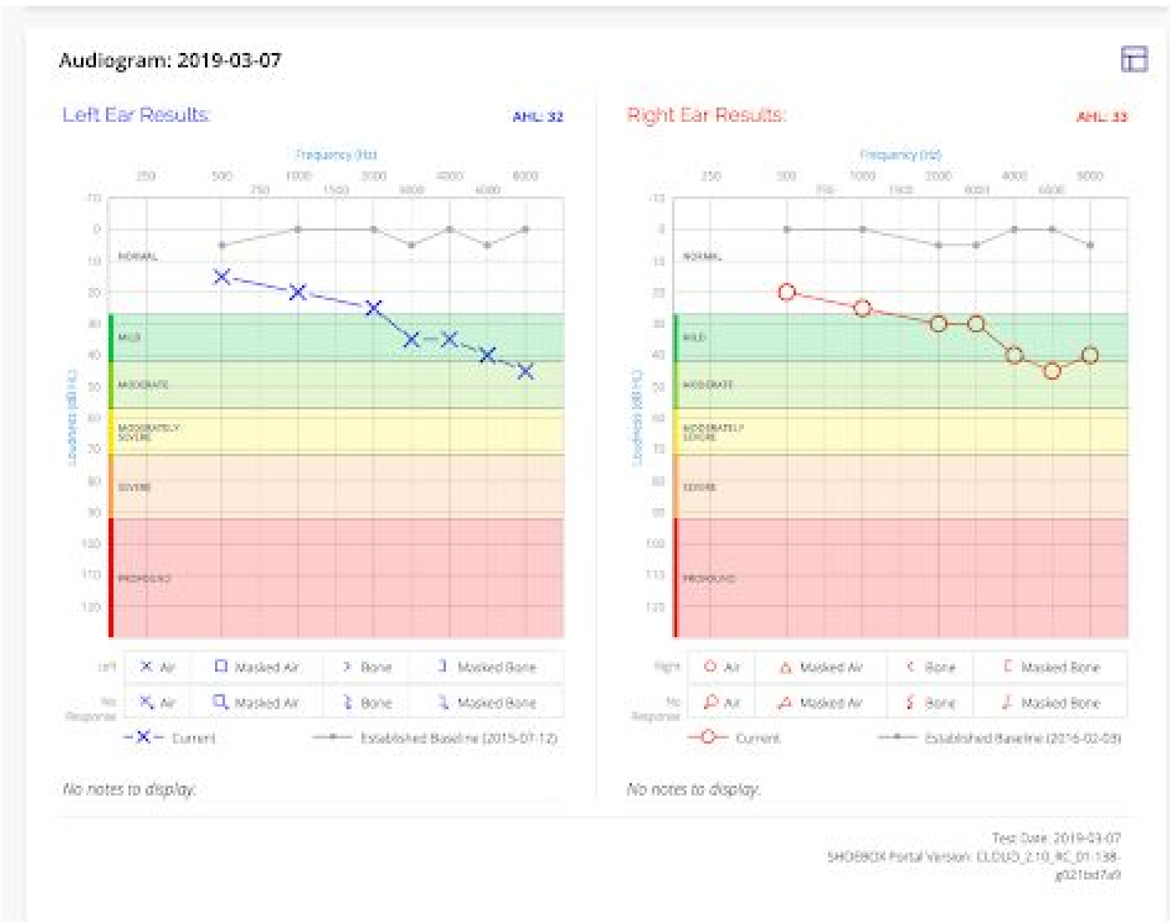
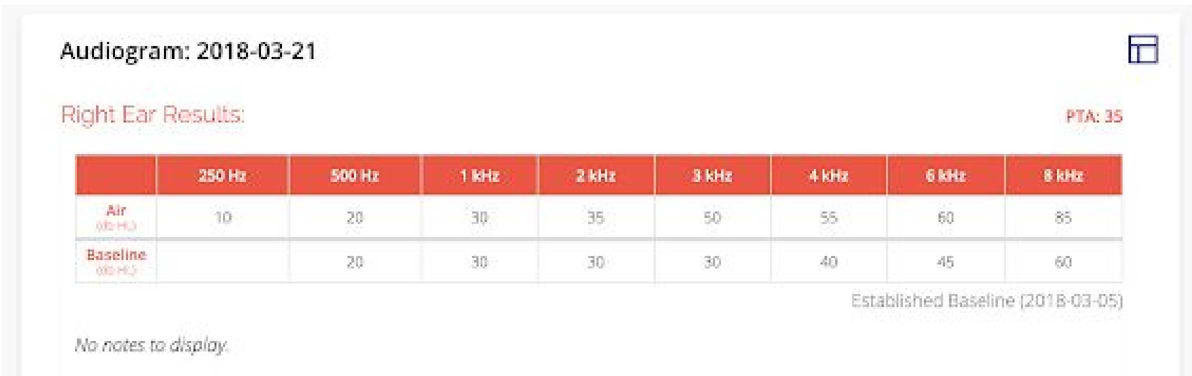


Table View:

- 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.



Audiogram: 2018-03-21

Right Ear Results: PTA: 35

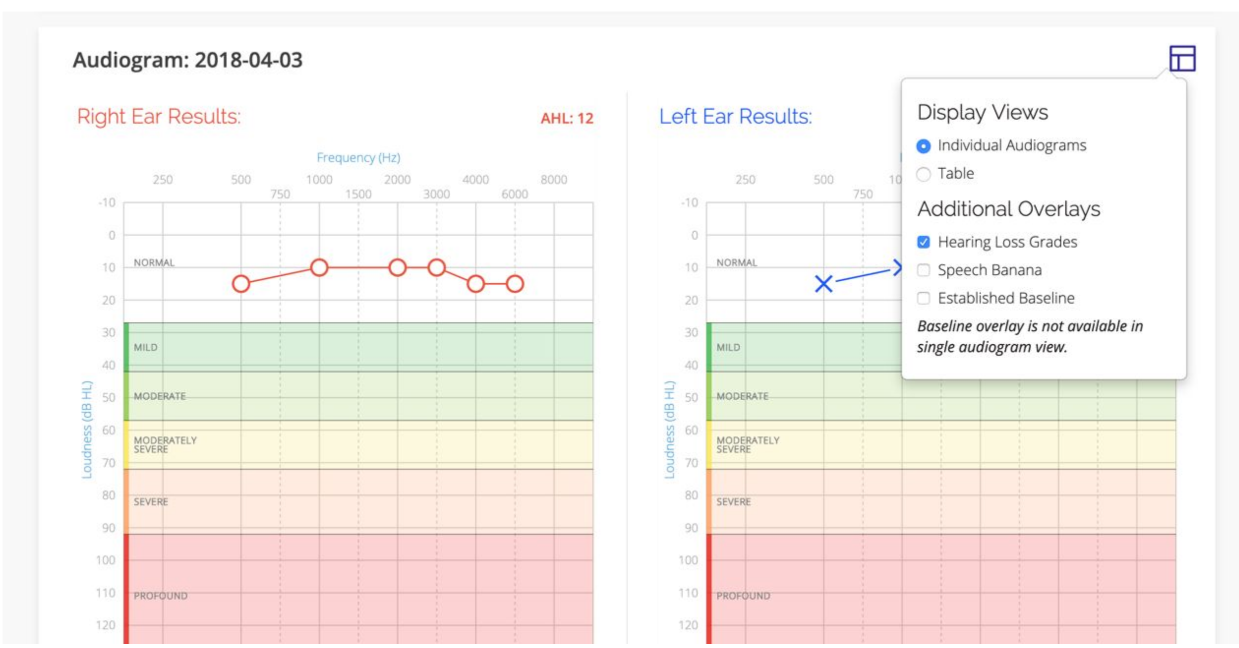
	250 Hz	500 Hz	1 kHz	2 kHz	3 kHz	4 kHz	6 kHz	8 kHz
Air (dB HL)	10	20	30	35	50	55	60	85
Baseline (dB HL)		20	30	30	30	40	45	60

Established Baseline (2018-03-05)

No notes to display.

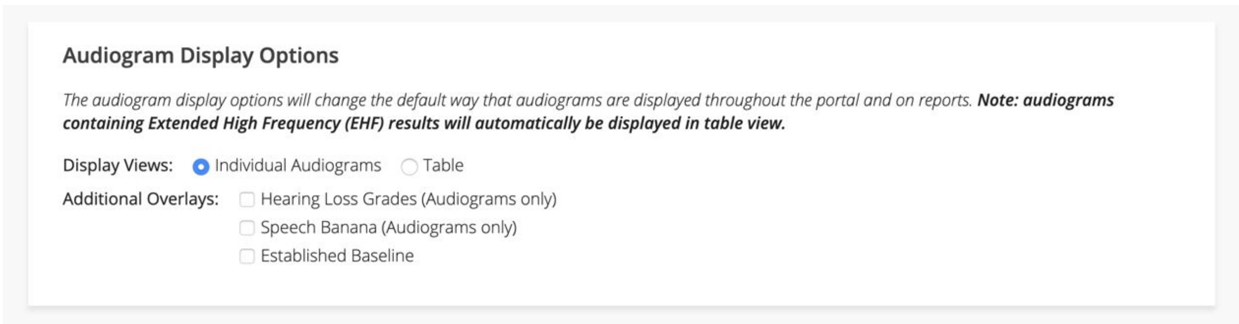
To change display options, such as switching from audiogram to table view or turning on / off overlays:

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 > SHOEBOX > 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.



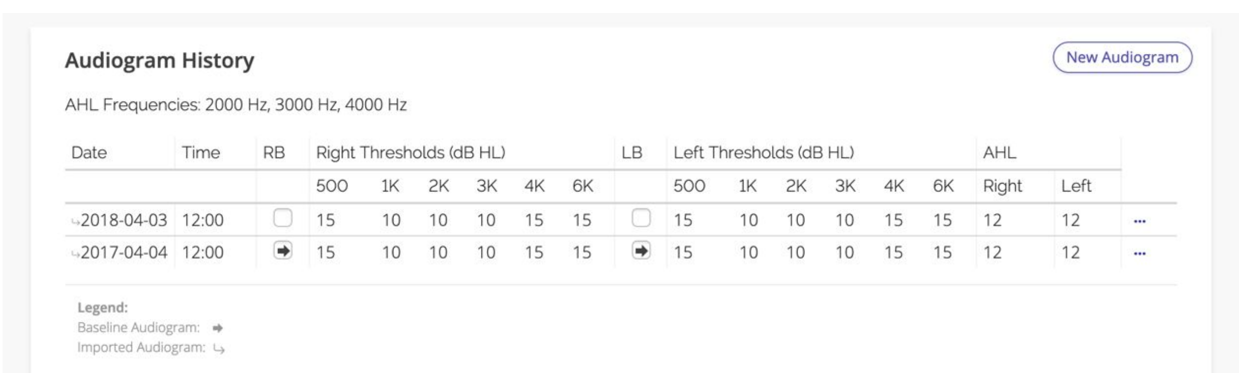
Audiogram History

This section contains all past and present audiograms associated with the patient. Imported audiograms are indicated with a ↳ while SHOEBOX-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+):

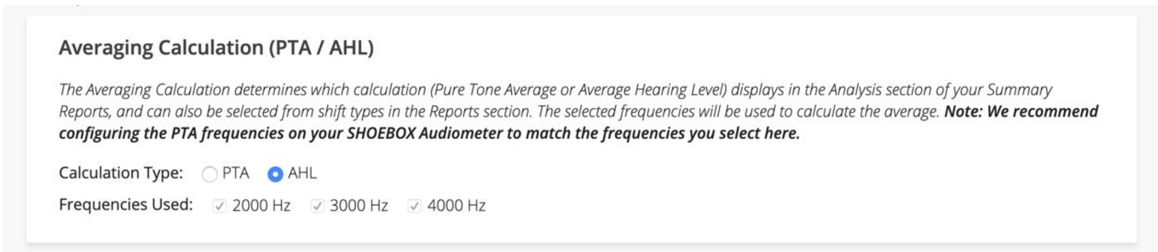
1. Click the box in the LB (Left Baseline) or RB (Right Baseline) column of the test you wish to set as a baseline.



Date	Time	RB	Right Thresholds (dB HL)						LB	Left Thresholds (dB HL)						AHL		
			500	1K	2K	3K	4K	6K		500	1K	2K	3K	4K	6K	Right	Left	
↳2018-04-03	12:00	☐	15	10	10	10	15	15	☐	15	10	10	10	15	15	12	12	...
↳2017-04-04	12:00	➡	15	10	10	10	15	15	➡	15	10	10	10	15	15	12	12	...

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

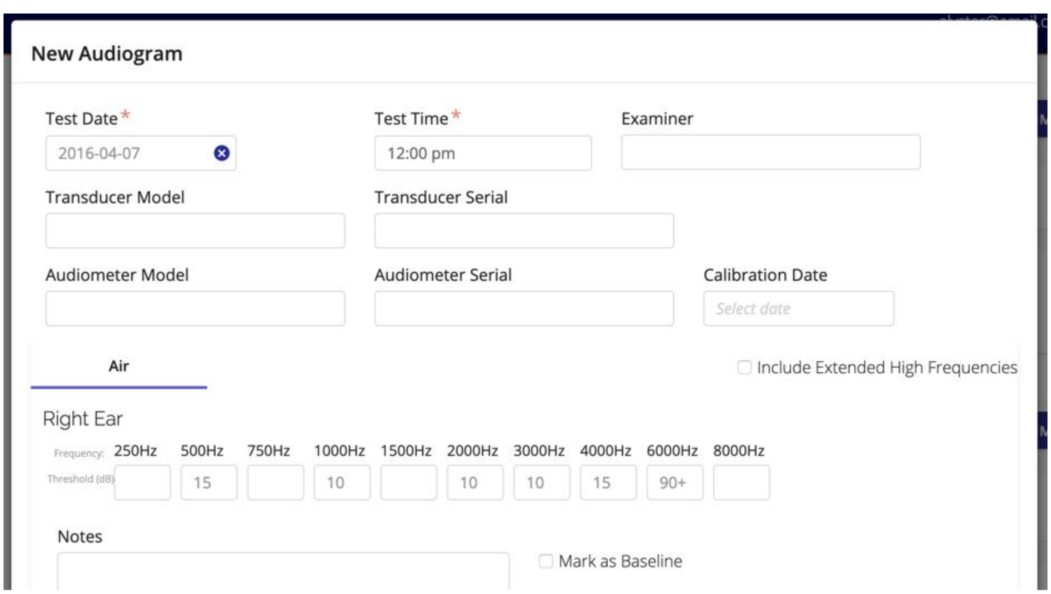
1. Go to Settings > SHOEBOX > General.
2. Find the Averaging Calculation section under Analysis.
3. Select which calculation type you want to use (PTA or AHL).
4. For PTA, select which frequencies you would like to use for calculations. *Hint: we recommend configuring the PTA frequencies in your SHOEBOX 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+):

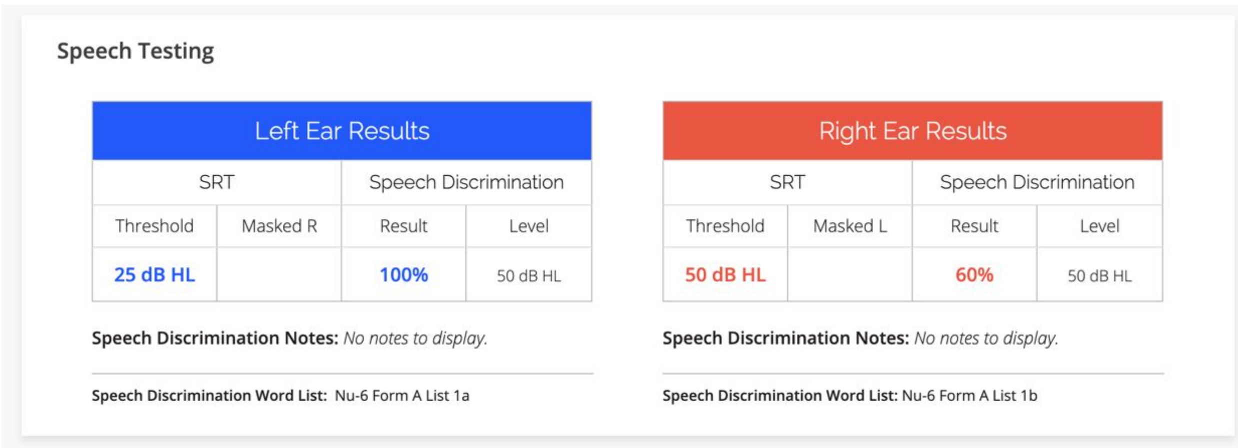
1. Click the "New Audiogram" button in the right corner of the Audiogram History section.
2. A modal will appear with all necessary fields for adding audiogram data.
3. For each frequency, you can input a number to indicate a threshold (e.g. 70) or a number with a plus sign (+) to indicate a no response (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

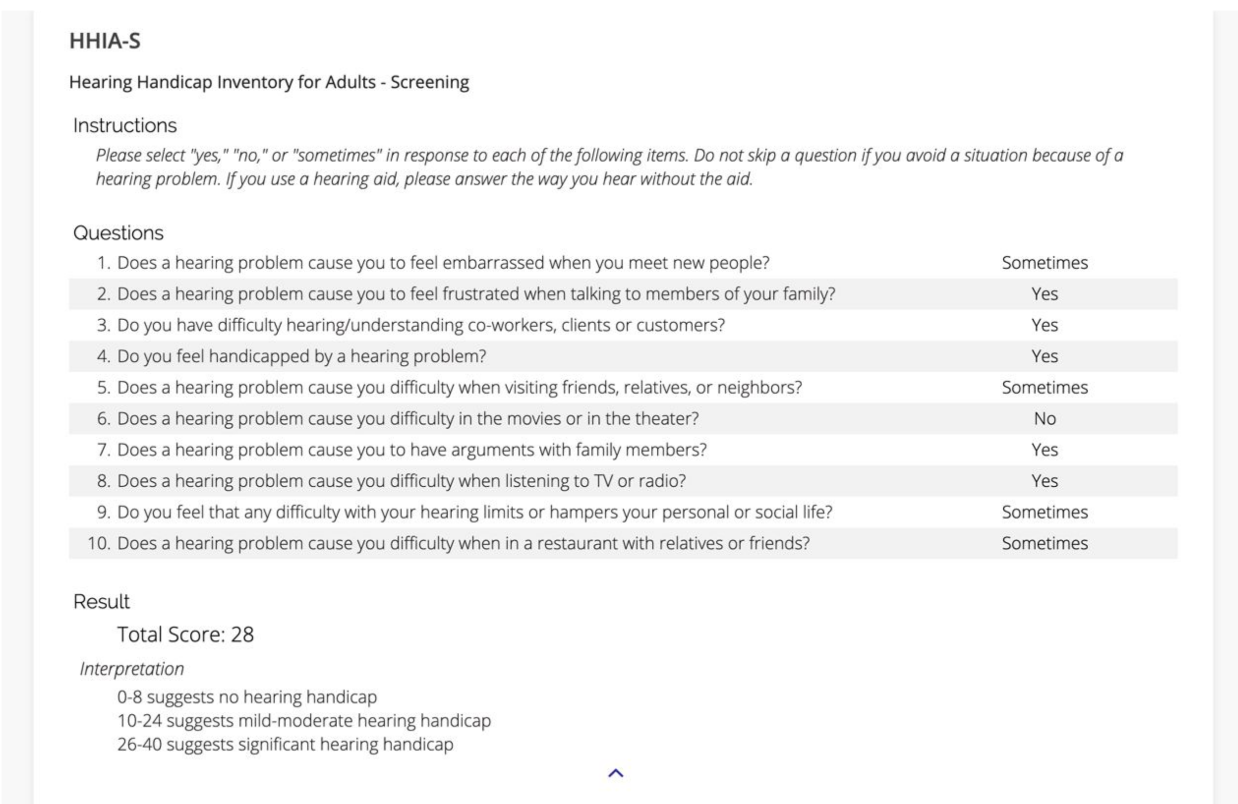
Right Ear Results			
SRT		Speech Discrimination	
Threshold	Masked L	Result	Level
50 dB HL		**60%**	50 dB HL

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

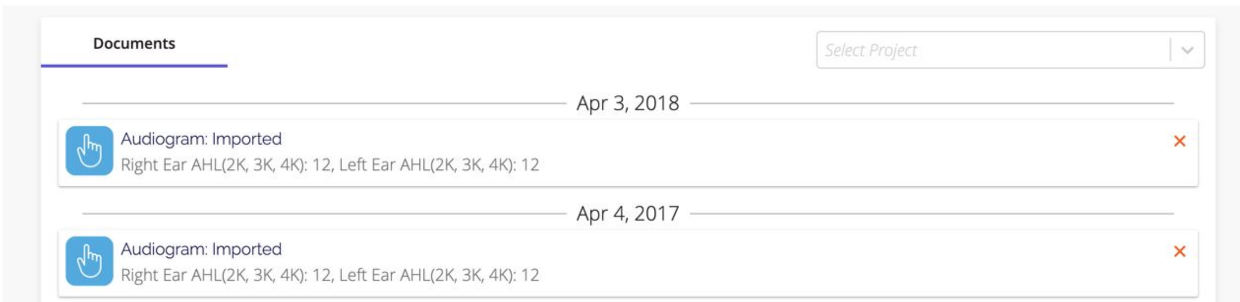
Interpretation

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.

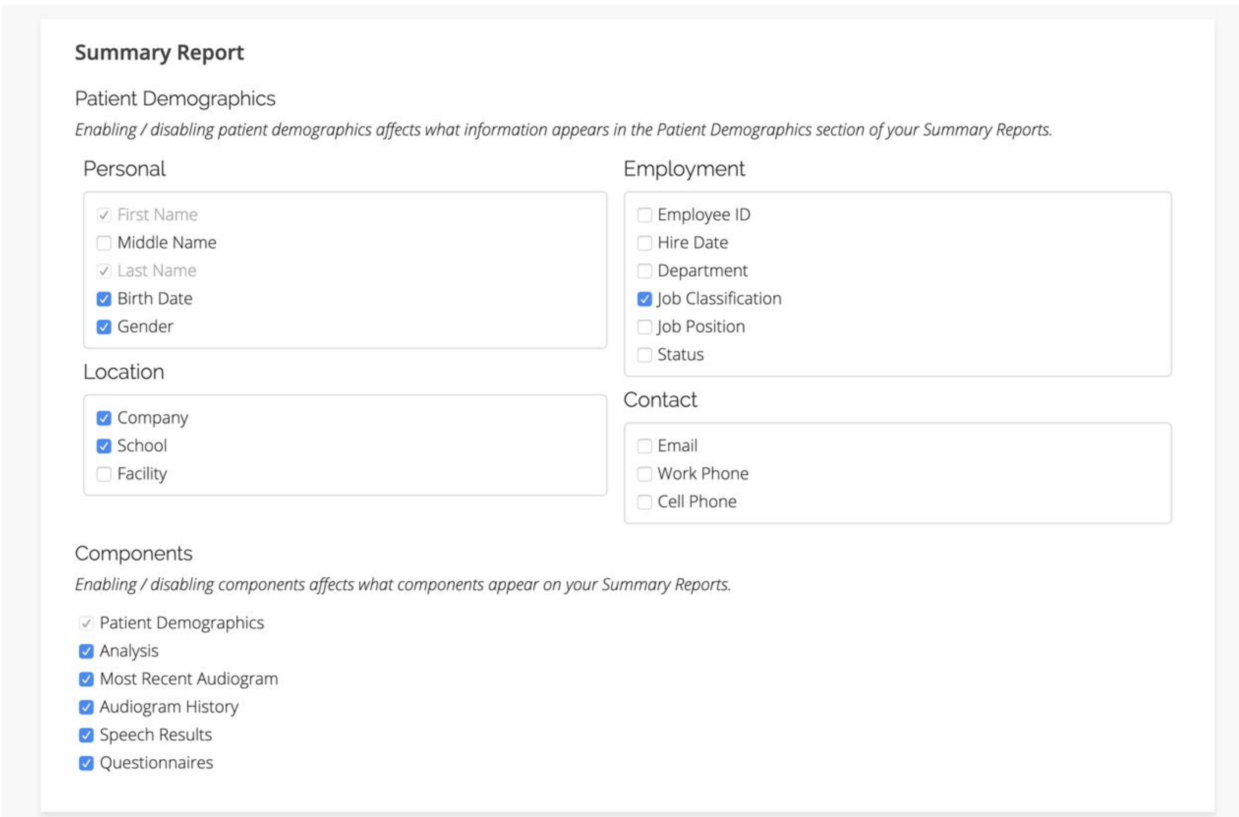
A Summary Report can include the following information:

- 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+):

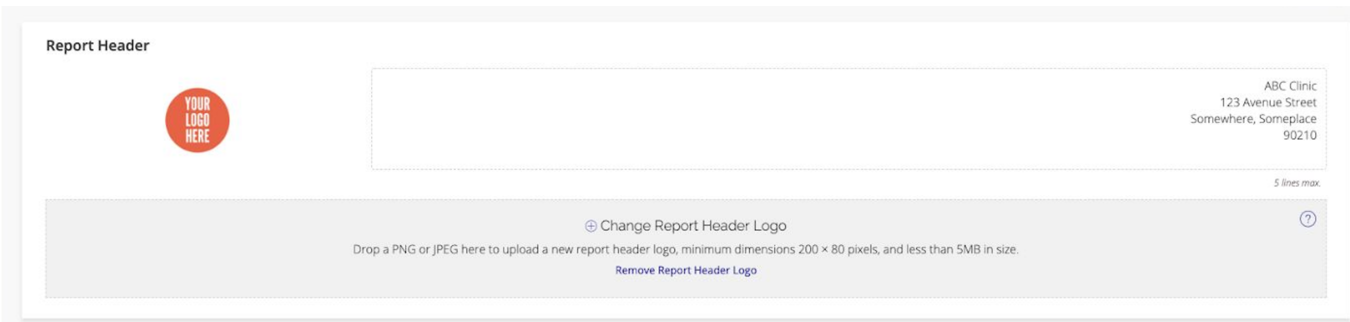
- Go to Settings > SHOEBOX > Reports.
- Find the Summary Report section.
- Select / deselect which fields and components you would like to include in the Patient Demographics and Components sub-sections.

  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.



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

1. Go to Settings > SHOEBOX > 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.



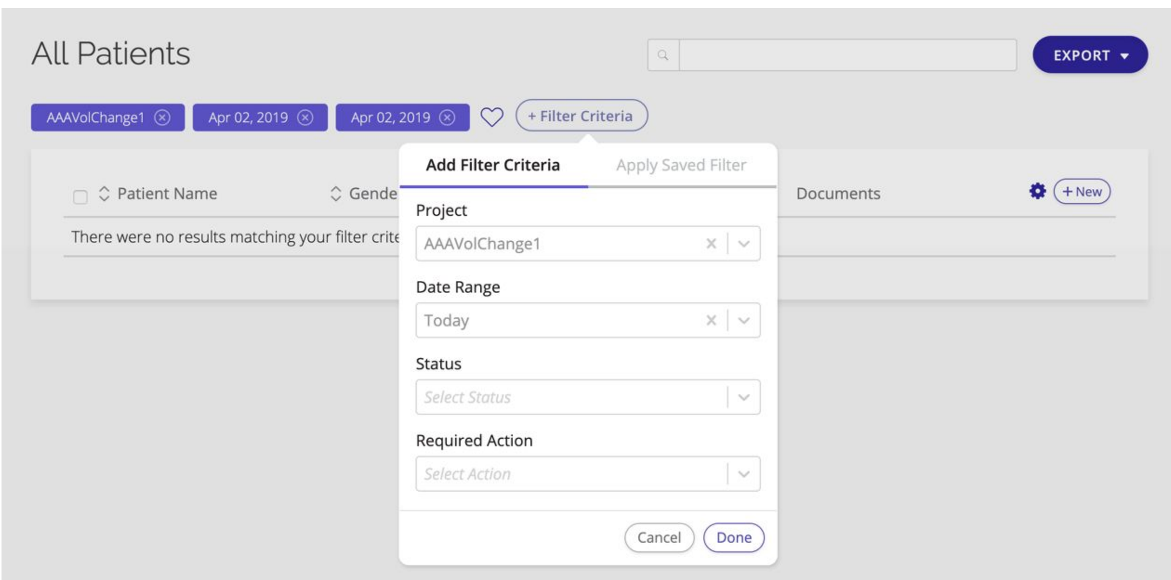
Working With Filters

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

Adding Filters

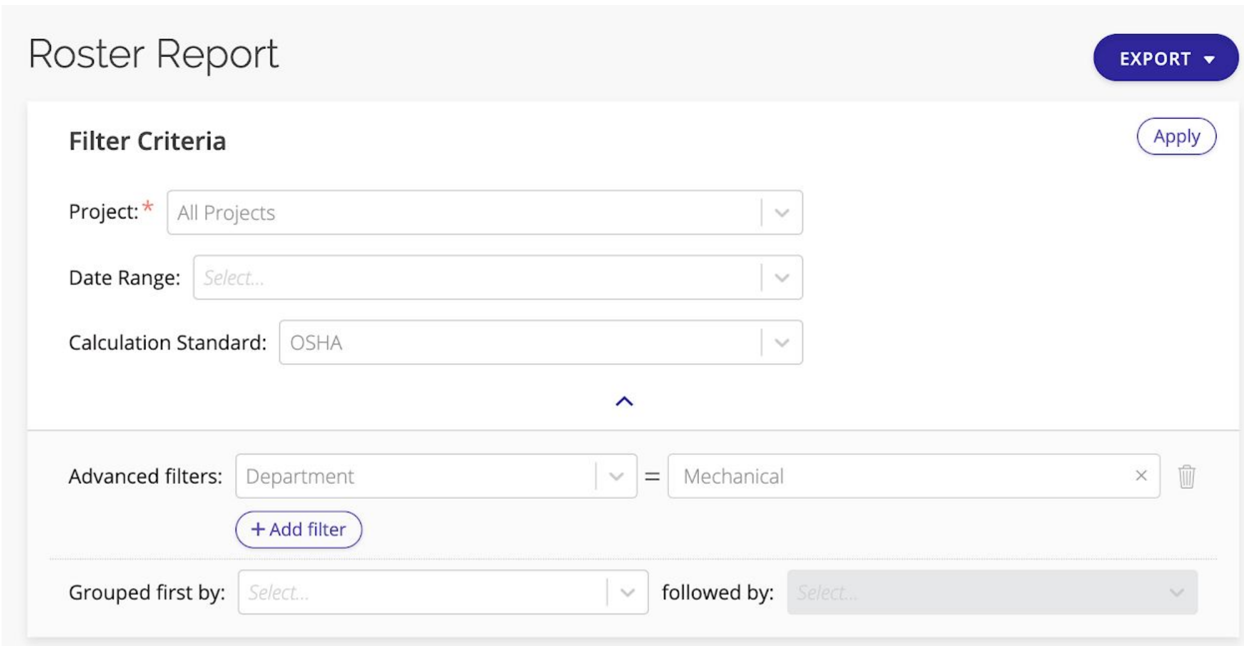
On the Patients page:

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.

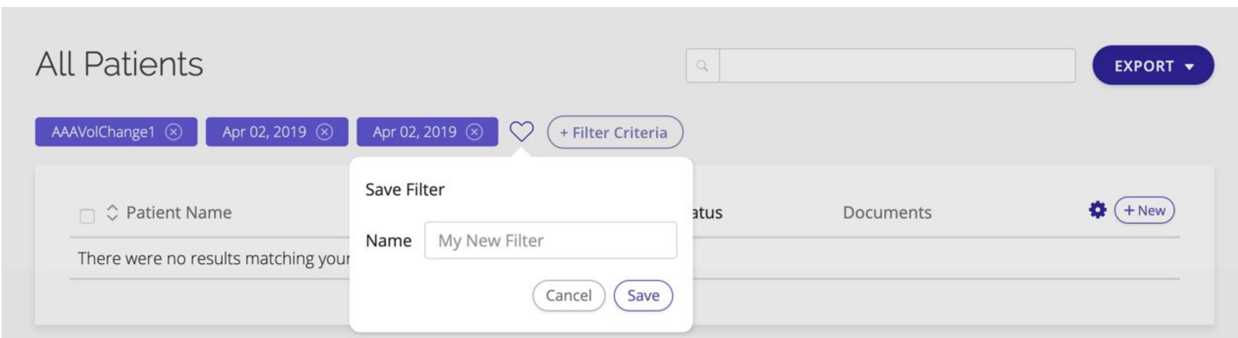


Saving Filters

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

To create a Saved Filter:

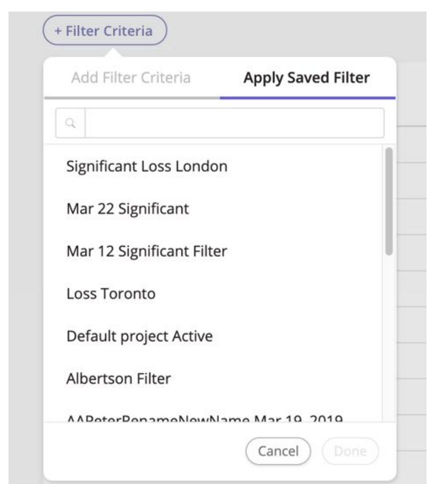
1. Add your desired filter criteria as described in Adding Filters.
2. Click  next to the filter criteria to save this filter.
3. You can use our smart filter name or enter your own name.
4. Click "Save" when finished.
5. This filter will then be available under the "Apply Saved Filter" tab when adding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

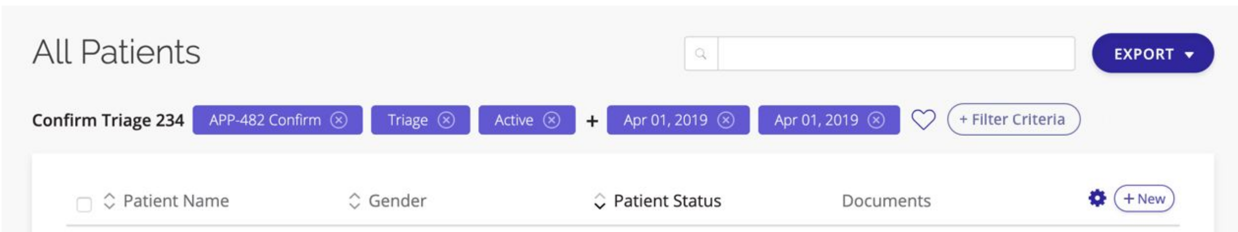


Updating Saved Filters

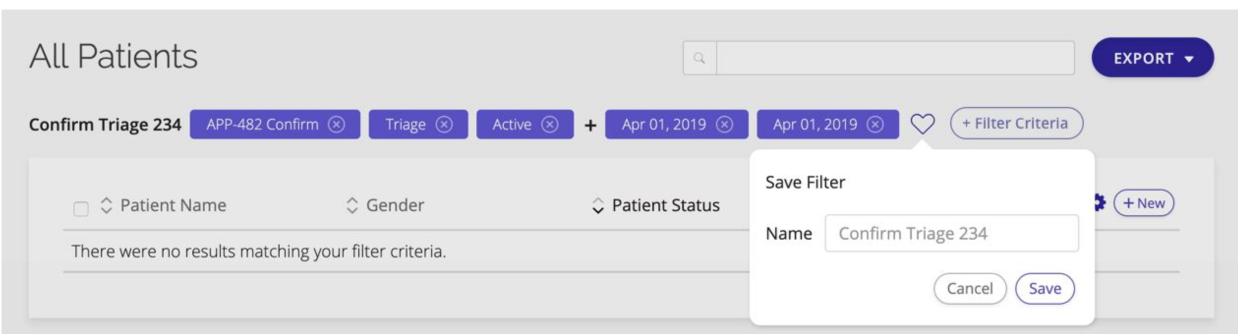
Saved Filters can be updated from the Patients page.

To update a Saved Filter:

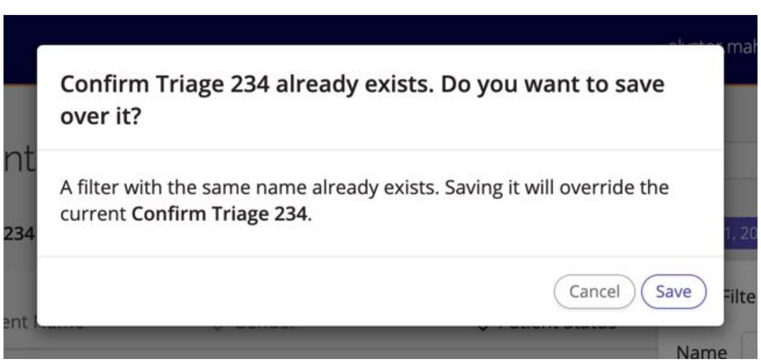
1. Add a Saved Filter by following the steps in Adding Saved Filters.
2. Add or remove filter criteria by following the steps in Adding Filters.
3. Click next to filter criteria to save this filter.



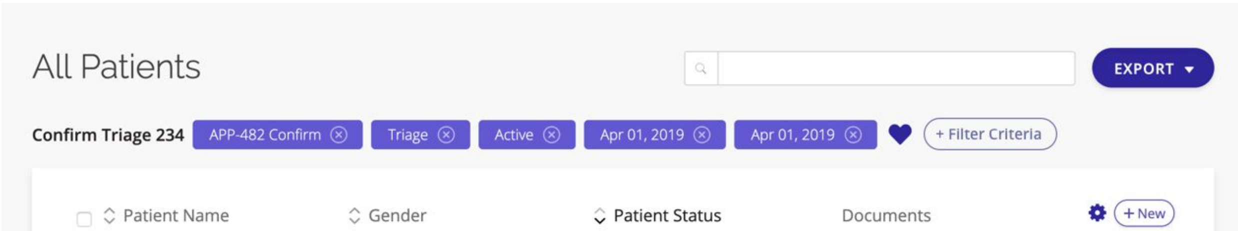
4. Ensure that you **do not** update the name of the filter.



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

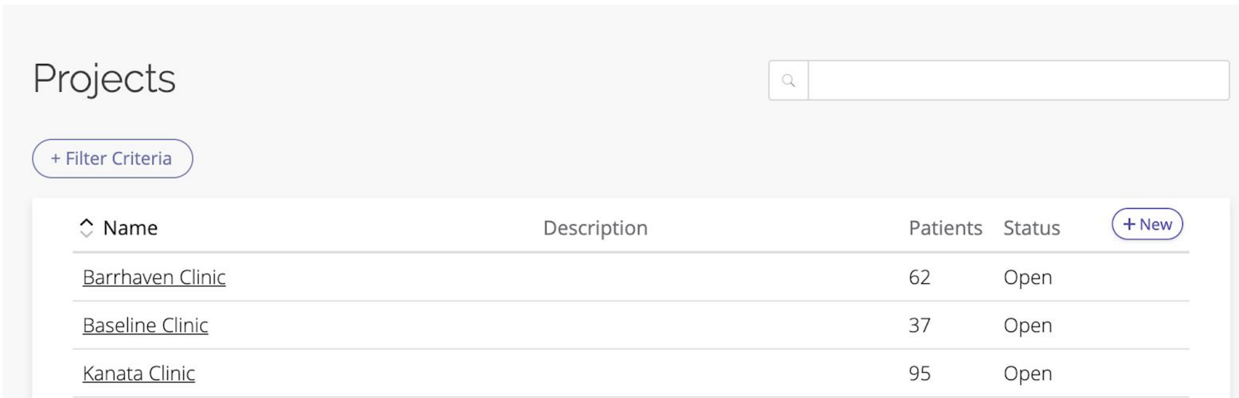


6. Saved Filter will now contain updated filter criteria.



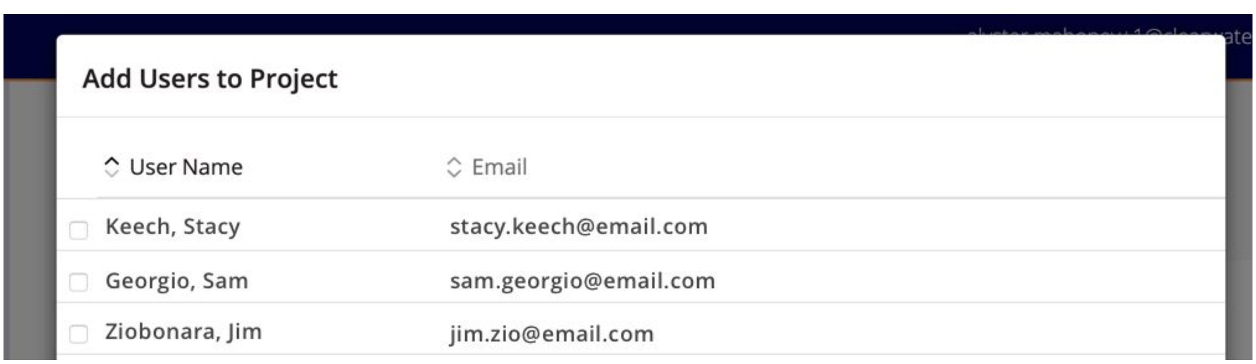
Working with Projects

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.



To create a project (DM+):

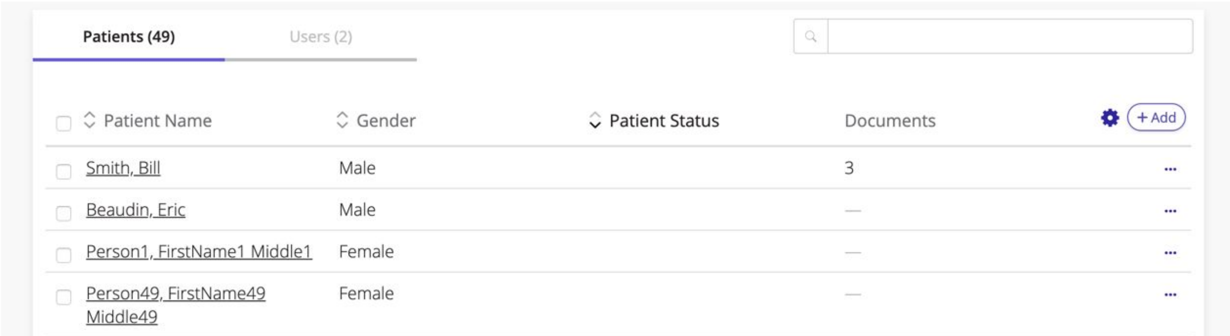
1. Go to Projects.
2. Click the “New” button.
3. Name your project and add start and end dates if desired.
4. Click “Create”.
5. You’ll be automatically redirected to the individual project page, and prompted to add additional users to the project (as project creator, you will be added automatically).
    - Users who are part of a project are able to access the project’s patients on the SHOEBOX app.
    - These users are also able to add data to the project from the SHOEBOX 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”.



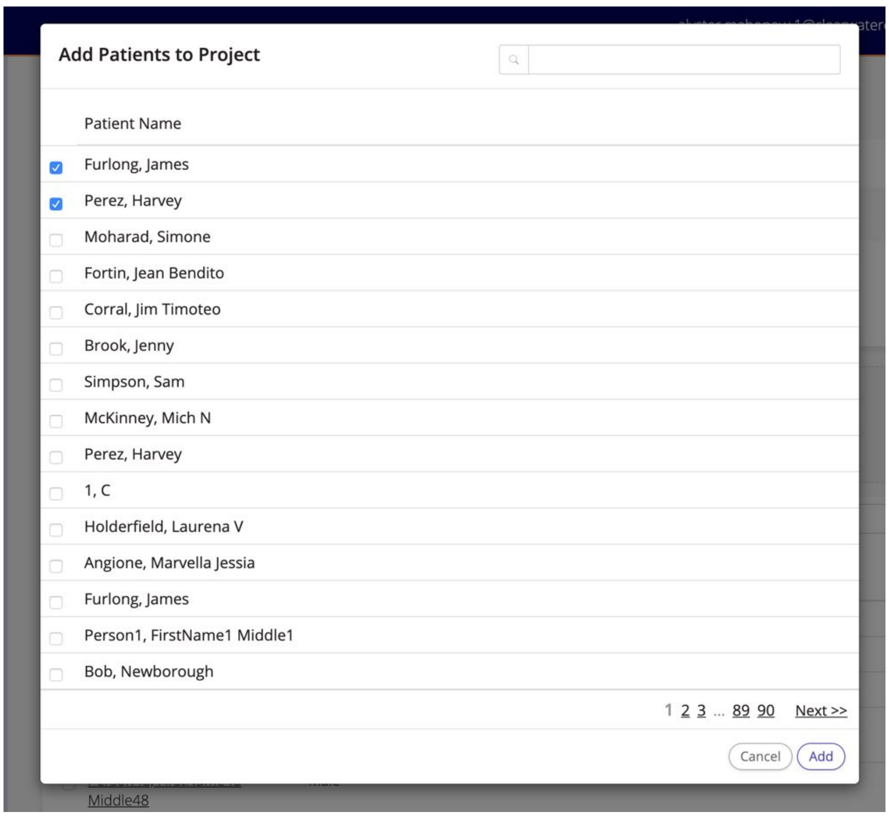
You can add patients to a project by importing them (see Importing Patients for more information), or by adding them manually.

To add patients manually:

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



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

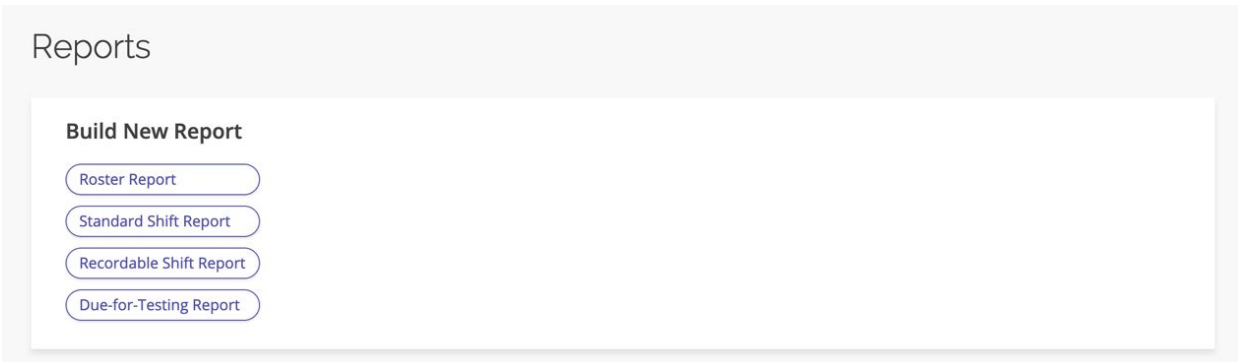
- Generates a list of people who need to be tested within a specified date range.
- Only enabled when Testing Program Rules are set up in General Settings (see General Settings section for more information).

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.

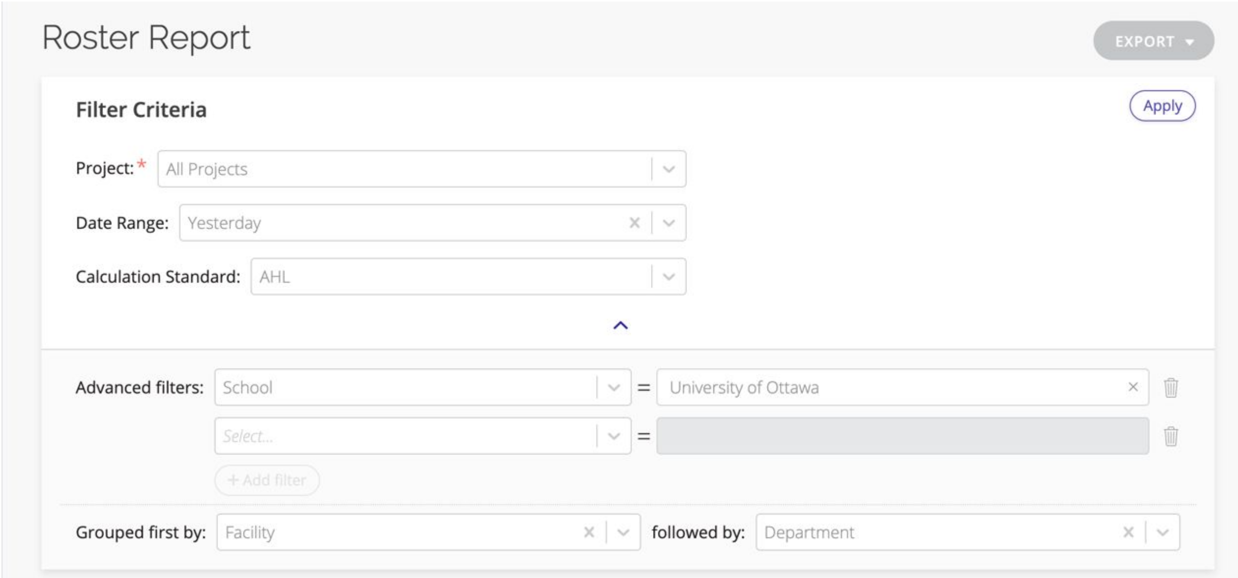


2. Enter the Filter Criteria. You can specify the following:
    a. The project for which you want to run the report.
    b. The date range or testing due date. *Hint: select "Custom" from the list to specify your own date range. The testing due date is always specified from today to a date in the future.*
    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.

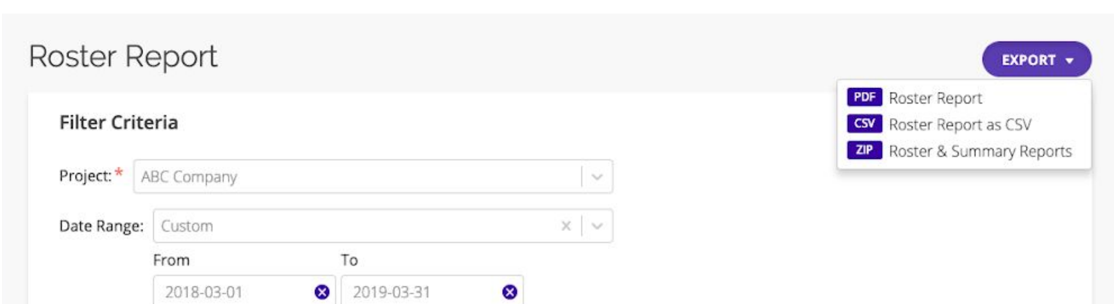
4. Access grouping options by clicking on "More Options". You can choose to group the list of patients or employees in your report by one or two levels of groupings.
    a. Example: You could group patients or employees first by department, then by job classification.
    b. Patients or employees would then be organized under the subheadings of their job classifications, and those would be organized under the headings of each department.



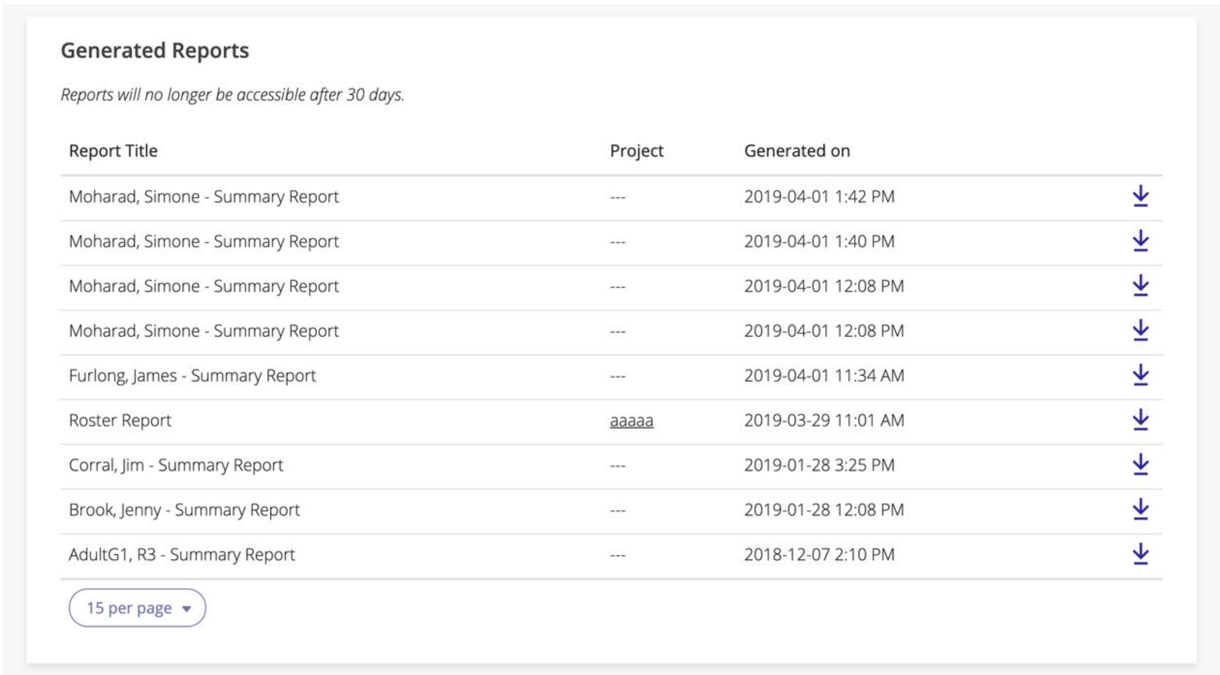
5. Once you have added all your filter criteria, click "Apply" to preview the report.
    a. This preview includes a summary section of the results as well as a list of the patients / employees who meet the filter criteria you specified.

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.



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.

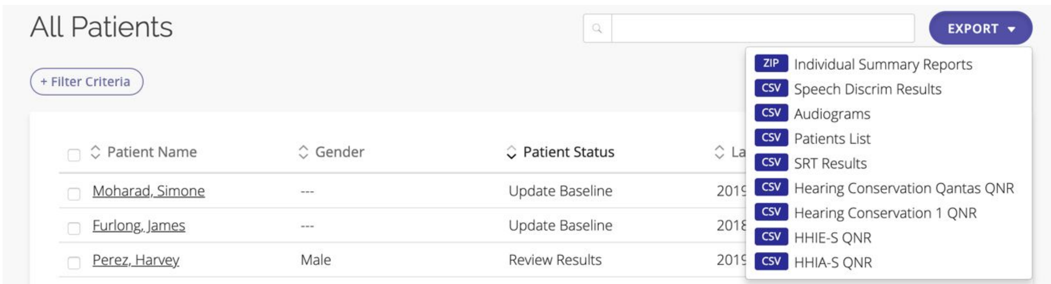
Report Title	Project	Generated on	
Moharad, Simone - Summary Report	---	2019-04-01 1:42 PM	
Moharad, Simone - Summary Report	---	2019-04-01 1:40 PM	
Moharad, Simone - Summary Report	---	2019-04-01 12:08 PM	
Moharad, Simone - Summary Report	---	2019-04-01 12:08 PM	
Furlong, James - Summary Report	---	2019-04-01 11:34 AM	
Roster Report	aaaaa	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:

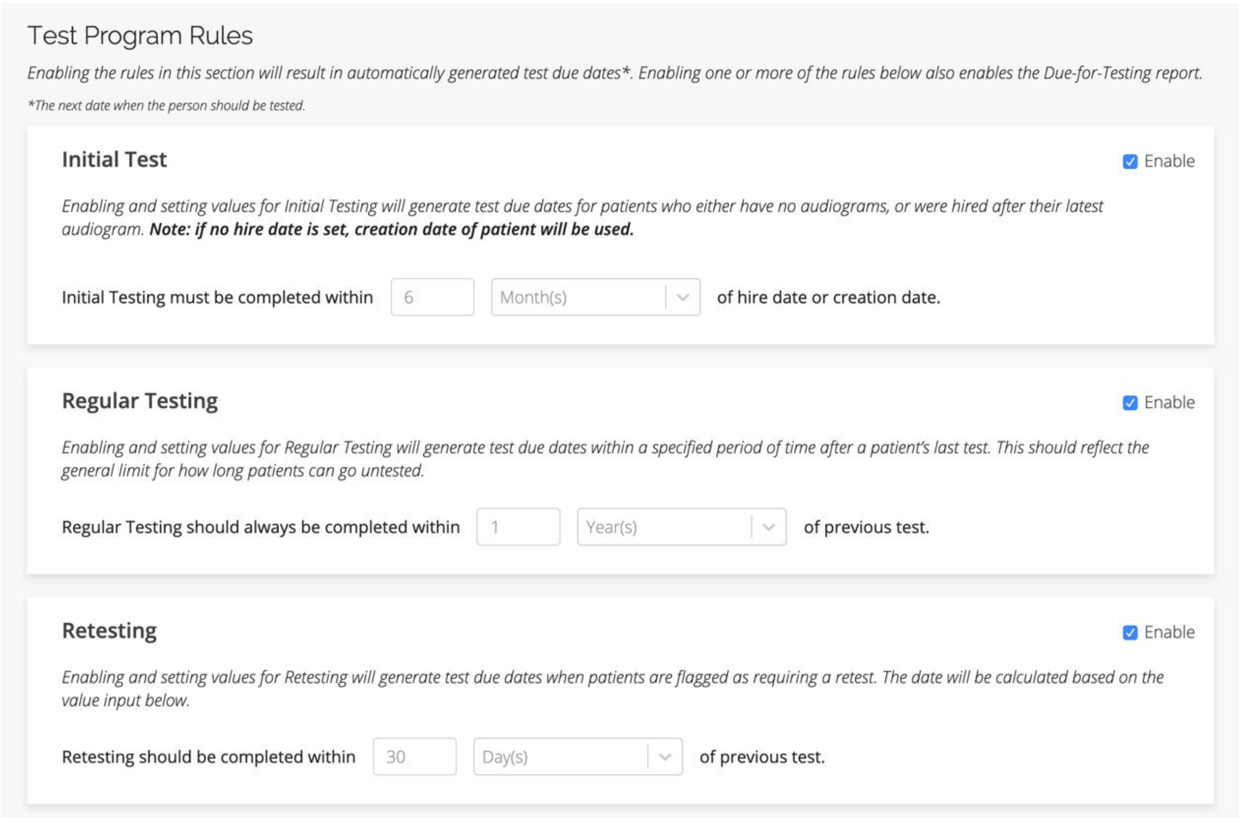
- Audiogram Display Options *(see Audiogram section for more information).*
- Patient Demographics *(see Patient Demographics section for more information).*
- Patient Demographics Protection *(see Patient Demographics section for more information).*
- Analysis *(see Analysis and Audiogram History sections 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.



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.

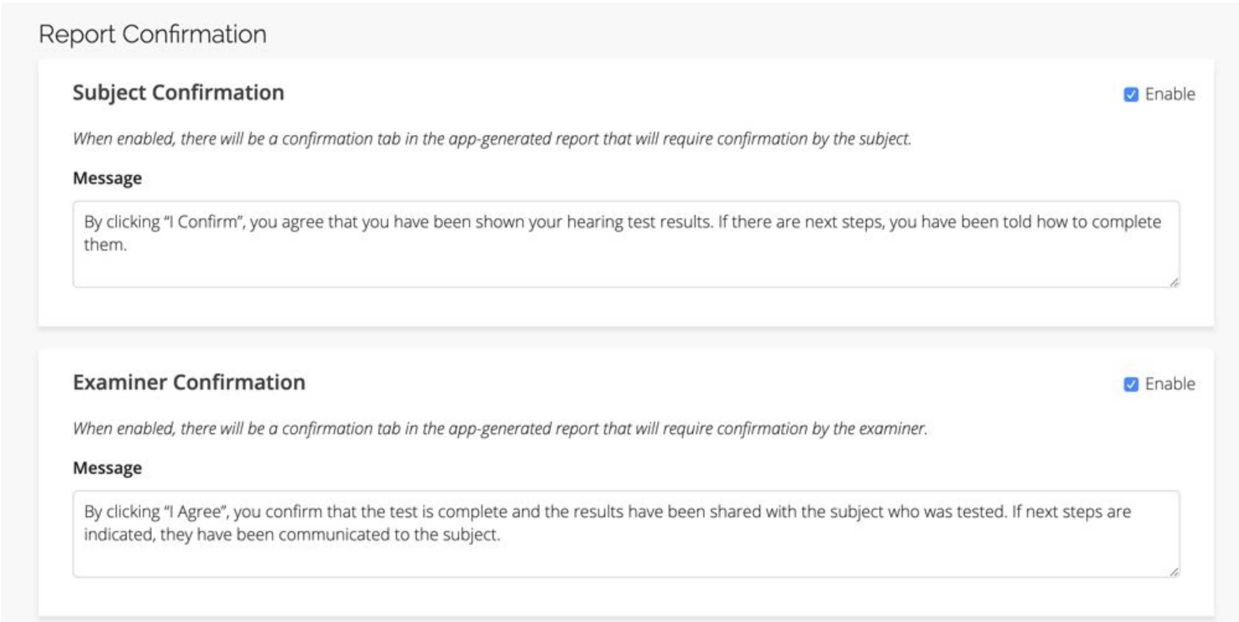
Report Confirmation

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



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.