

# SHOEBOX Data Import Reference Guide

## Overview

The SHOEBOX data import module available with Data Management PLUS supports bulk import of patients and audiograms for Benson and non Benson (generic format).

This document is a supplement to the templates provided on the website and provides step-by-step instructions on how to import patients and audiograms, as well as explanations for each of the fields supported in the upload.

## Step-by-step instructions for importing patients/audiograms to the portal

Important: If importing patient lists or audiograms, you should perform the steps below before starting your testing on SHOEBOX with these patients.

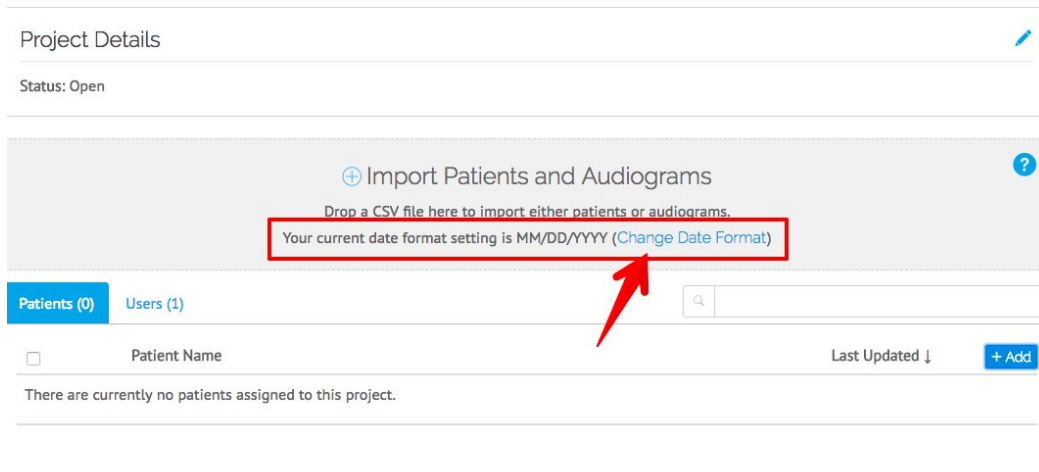
### Part 1: Prepare your import file

- Go to the SHOEBOX support webpage [www.shoebox.md/support](http://www.shoebox.md/support) and select SHOEBOX Data Management.
- Scroll to the Manuals & Templates section and download the patient/audiogram template you require (Patient Import, Audiogram Import, Benson Patient Import, Benson Audiogram Import) from the website.
- Add your specific information to your template file and Save to your preferred folder on your computer. **Please refer to the explanations of the fields in the template explanation section of this document.**

### Important notes when creating these import files:

- The Patient Import and Benson Patient Import documents you create should have first and last name, birth date, and gender at a minimum. Any fields that you do not use, please leave blank and do not modify the format of the file in any way.
- If you have plans to periodically update the patient list, change existing patient demographics, or link audiogram records from an external system to patients, then the Patient lists must include a unique ID number. This unique ID is used to “match” the correct person to the correct audiogram when it is imported, or to update the patient demographic information if there are periodic imports. This ID number should be unique for each individual in your entire organization. If using the Patient Import template, this is referred as the “ExternalID”. If using the Benson Patient Import template, this is referred as the “SubjectGUID”.

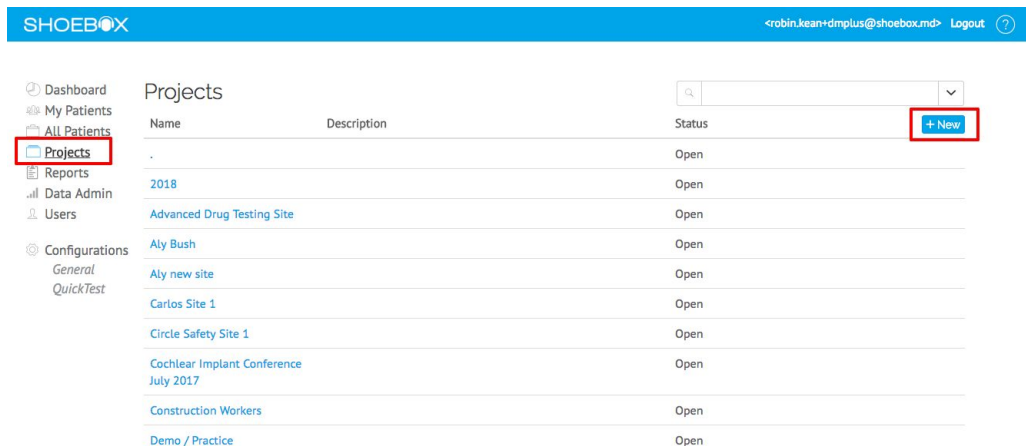
- If your files do not already include/generate a unique identifier for each person, then examples of what you may choose to use when creating the unique identifier are:
  - o Combination of first name, last name, and date of birth
  - o Combination of first name, last name, and employee number
  - o Employee numbers, if they are guaranteed to be unique for all employees at all times
- Make sure the date format selected is the same as the date format entered in the template. Click "Change Date Format" button before the upload to align.




- All dates in your import file should use the same date format.

## Part 2: Upload the data into your Data Management web portal



1. Login to your Data Management web portal.
2. Create the Project in which you want to load these patients & audiograms.



3. Once you have created the project, open the Project by clicking on its name, click on the “Patients” tab and add the Patients list / Previous Audiogram list that you saved on your computer by clicking on the + symbol. You can select “Change Date Format” in order to align the format with the date format of the fields in your import file.

Project Details 

Status: Open

 Import Patients and Audiograms 


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

Your current date format setting is YYYY-MM-DD ([Change Date Format](#))



Patients (0) Users (1)

◇ User Name ◇ Email ◇ Status [+ Add](#)

4. Successful imports will show as “Imported”. You can view warnings or undo this upload if need be. Unsuccessful imports will show as “Failed”, you are able to click “View Errors” to see why the upload failed.

Project Details 

Status: Open

 Import Patients and Audiograms 

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

Your current date format setting is MM/DD/YYYY ([Change Date Format](#))

9:23:12 SHOEBOX-Patient-Import-Robin.csv Imported [Undo](#)

Patients (1) Users (1)

Patient Name Last Updated ↓ [+ Add](#)

Kean, Robin 2018-08-15 9:23 AM ...

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5. Once the patients are in the project you can upload the audiogram list from the same screen as above.

⊕ Import Patients and Audiograms

Please remember when uploading your Audiogram list the External ID is what links the audiogram to the patient.

## TEMPLATE EXPLANATIONS

### Generic patient import

The patient CSV file must contain the following fields or a subset of them:

Name	Type	Required	Description
ExternalID	Alphanumeric	No	This field is a unique identifier for the patient being tested. It is used to link this specific patient to audiograms generated or uploaded with the same ExternalID.
<b>LastName</b>	<b>Alphanumeric</b>	<b>Yes</b>	<b>Last name</b>
<b>FirstName</b>	<b>Alphanumeric</b>	<b>Yes</b>	<b>First name</b>
MI	Alphanumeric	No	Middle name or initial
<b>Sex</b>	<b>Alphanumeric</b>	<b>Yes</b>	<b>Use M or F character here. This field is required for proper OSHA and/or MSHA calculations where age correction is applied.</b>
<b>BirthDate</b>	<b>Date</b>	<b>Yes</b>	<b>Birth Date</b>
HireDate	Date	No	Hire Date
Email	Alphanumeric	No	Email address
TestDate	Date	No	Date of most recent hearing test
CellPhone	Alphanumeric	No	Phone number
Addr1	Alphanumeric	No	Address Line 1
Addr2	Alphanumeric	No	Address Line 2
Addr3	Alphanumeric	No	Address Line 3
City	Alphanumeric	No	Address City
State	Alphanumeric	No	Address State / Province
Country	Alphanumeric	No	Address Country
Zip	Alphanumeric	No	Zip or Postal Code
School	Alphanumeric	No	School Name
JobClassification	Alphanumeric	No	Job Classification/Name
Company	Alphanumeric	No	Company name
EmployeeNumber	Alphanumeric	No	Employee number
Facility	Alphanumeric	No	Facility or location

Department	Alphanumeric	No	Department
JobPosition	Alphanumeric	No	Job Position (sometimes considered to be the next level of detail under the JobClassification)
Status	Alphanumeric	No	Active or Inactive status. Accepted values are A, I, Active, Inactive
ActiveDate	Date	No	Date where employee was last active in the hearing conservation program

## Generic Audiogram import

Name	Type	Required	Description
TestGuid	Alphanumeric	No	Input the unique TestID from your historical data if available, otherwise leave this field blank.
ExternalId	Alphanumeric	Yes	<b>This field is a unique identifier for the patient being tested. It is used to link this audiogram record to the specific patient with the same ExternalID. The patient must be uploaded prior to the audiograms being uploaded.</b>
TestDate	Date	Yes	<b>Test Date</b>
TestTime	Time	No	supported time formats: (24 hour) hh:mm:ss, hh:mm, hhmmss, hhmm (12 hour) hh:mm:ss am/pm, hh:mm am/pm
Examiner	Alphanumeric	No	Examiner name
LeftBaseline	Y/N	No	Use Y to indicate it is the baseline. An empty cell or N indicates that it is not the Left Ear Baseline audiogram.
RightBaseline	Y/N	No	Use Y to indicate it is the baseline. An empty cell or N indicates that it is not the Right Ear Baseline audiogram.
Comment	Alphanumeric	No	Maximum 256 characters : Audiogram comments
TransducerModel	Alphanumeric	No	Transducer Model
TransducerSerial	Alphanumeric	No	Transducer Serial
AudiometerModel	Alphanumeric	No	Audiometer Model
AudiometerSerial	Alphanumeric	No	Audiometer Serial
CalibrationDate	Date	No	Calibration Date
LeftThresh<frequency>	Numeric	No	Left threshold for specified frequency. Valid frequencies are: 250 500 750 1000 1500 2000 3000 4000 6000 8000 10000 12500 16000. Example: LeftThresh1000 represents the Left Ear Threshold at 1000Hz. For No Response or Not Tested use NR , NT or leave empty
RightThresh<frequency>	Numeric	No	Right threshold for specified frequency. Valid frequencies are: 250 500 750 1000 1500 2000 3000 4000 6000 8000 10000 12500 16000 For No Response or Not Tested use NR , NT or leave empty

## Benson patient import

Name	Type	Required	Description
SubjectGuid	Alphanumeric	No	This field is a unique identifier for the patient being tested. It is used to link this specific patient with audiogram results with the same SubjectGuid.
<b>LastName</b>	<b>Alphanumeric</b>	<b>Yes</b>	<b>Last name</b>
<b>FirstName</b>	<b>Alphanumeric</b>	<b>Yes</b>	<b>First name</b>
MI	Alphanumeric	No	Middle name
<b>Sex</b>	<b>Alphanumeric</b>	<b>Yes</b>	<b>Use M or F character here. This field is required for proper OSHA and/or MSHA calculations where age correction is applied.</b>
<b>BirthDate</b>	<b>Date</b>	<b>Yes</b>	<b>Birth Date, format should be YYYYMMDD or YYYY-MM-DD</b>
HireDate	Date	No	Hire Date, format should be YYYYMMDD or YYYY-MM-DD
Email	Alphanumeric	No	Email address
TestDate	Date	No	Date of most recent hearing test, format should be YYYYMMDD or YYYY-MM-DD
CellPhone	Alphanumeric	No	Phone number
Addr1	Alphanumeric	No	Address Line 1
Addr2	Alphanumeric	No	Address Line 2
Addr3	Alphanumeric	No	Address Line 3
City	Alphanumeric	No	Address City
State	Alphanumeric	No	Address State / Province
Country	Alphanumeric	No	Address Country
Zip	Alphanumeric	No	Zip or postal code
School	Alphanumeric	No	School Name
JobClassification	Alphanumeric	No	Job Classification/Name
Company	Alphanumeric	No	Company name
EmployeeNumber	Alphanumeric	No	Employee number
Facility	Alphanumeric	No	Facility or location
Department	Alphanumeric	No	Department



## Benson Audiogram import

Name	Type	Required	Description
TestGuid	Alphanumeric	No	Input the unique TestID from Benson historical data if available, otherwise leave this field blank.
SubjectGuid	Alphanumeric	Yes	This field is a unique identifier for the patient being tested. It is used to link this audiogram record to the specific patient with the same SubjectGuid.
TestType	Numeric	No	Test type code meaning: 126: Left and Right baseline 6 or 38: Left baseline 24 or 88: Right baseline
TestDate	Date	Yes	Test Date in format: YYYYMMDD or YYYY-MM-DD
TestTime	Time	No	HHMMSS: Test time in 24 hour format
Comment	Alphanumeric	No	Maximum 256 characters : Audiogram comments
LeftThresh<frequency>	Numeric	No	Left threshold for specified frequency. Valid frequencies are: 250 500 750 1000 1500 2000 3000 4000 6000 8000 10000 12500 16000. Example: LeftThresh1000 represents the Left Ear Threshold at 1000Hz For No Response or Not Tested use NR , NT or leave empty
RightThresh<frequency>	Numeric	No	Right threshold for specified frequency. Valid frequencies are: 250 500 750 1000 1500 2000 3000 4000 6000 8000 10000 12500 16000. Example: RightThresh1000 represents the Right Ear Threshold at 1000Hz For No Response or Not Tested use NR , NT or leave empty

## FILE FORMAT NOTES

The order of the fields in the CSV import field can be different than the order listed above, as long as the fields are labelled correctly.

### Date formats for Patient Import and Audiogram Import templates:

All date columns on the Generic Patient Import and Audiogram Import templates support the following formats:

- YYYY-MM-DD (ISO date format)
- YYYY/MM/DD
- YYYYMMDD
- MM-DD-YYYY
- MM/DD/YYYY
- MMDDYYYY
- DD-MM-YYYY
- DD/MM/YYYY
- DDMMYYYY
- YY-MM-DD
- YY/MM/DD
- YYMMDD
- MM-DD-YY
- MM/DD/YY
- MMDDYY
- DD-MM-YY
- DD/MM/YY
- DDMMYY

### Date formats for Benson Patient Import and Benson Audiogram Import templates:

All date columns on the Benson Patient Import and Benson Audiogram Import templates support the following formats:

- YYYYMMDD
- YYYY-MM-DD

## ADVANCED USE CASES

### Importing patients without audiograms

For patients that have not been added to the SHOEBBOX software on the iPad or the SHOEBBOX web portal, you can import them directly to the SHOEBBOX Data Management portal. If you are importing a file from another external database system, then the external database will typically have a unique identifier for each patient. This unique identifier should be used in the “External ID/SubjectGuid” field. An import can be done with an empty External ID/SubjectGuid **only** if there is no intention to either import audiograms associated to these patients or later update these patients via an import function. If you are not sure if you will need to import associated audiograms or patient updates then we strongly recommend assigning a unique External ID/SubjectGuid. Note that the ID must be unique among all patients who have been uploaded to SHOEBBOX. If your external system does not already assign a unique ID, then you may want to compose an ID by combining first name, last name, and date of birth, or first name, last name and employee ID, as an example.

### Updating patients

In order to update patients through the import functionality, it is mandatory for them to have an External ID/SubjectGuid associated. If you did not assign an External ID/SubjectGuid when they were imported or created on the iPad, you have the option to assign an External ID (SubjectGuid is same as External ID on portal in case of Benson Patient Import) to each patient individually from the SHOEBBOX web portal and reference that External ID/SubjectGuid in the CSV import template prior to importing the file into the portal.

### Importing audiograms into SHOEBBOX

In order to import audiograms to the SHOEBBOX web portal you must have a valid patient either created through the SHOEBBOX software on the iPad or by the import to the SHOEBBOX web portal. It is mandatory to have assigned an External ID to each patient, either during upload or individually on the web portal, so it can be used to reference the patient External ID on the Audiogram import template. This allows the system to link the audiogram to the proper patient file.

### Import audiograms for a patient created in SHOEBBOX software on the iPad or manually in the SHOEBBOX web portal

If the patient was created through the SHOEBBOX software on the iPad or manually on the SHOEBBOX web portal, and then you want to import audiograms for the existing patient, it is

mandatory to assign an External ID. The External ID can then be referenced in the Audiogram import template.