Using Shadowbox

Updated on October 1, 2024 • 4:30 minutes to read

The Shadowbox application is a smart browser that enables an authenticated end user to access multiple applications at once, transferring data safely and securely across their healthcare applications.

Logging in

Shadowbox is typically branded for each client, such that the application carries their brand name. For example, if you are using Shadowbox to process orders and results with your diagnostic lab or imaging center, the name of the application will likely be your lab's name, and the icon for the application will carry your lab's logo. For the sake of example, we'll use ACME LABS as the example client.

To open the application, **click on the application icon** (shown to the right as ACME LABS). The application icon is likely located on your desktop, your taskbar, or in your downloads folder. If you are having issues with the installation or finding the application, please refer to the installation instructions.

Enter your username and password. Your Username and your password will be provided to you by Shadowbox. It is recommended that you update the password after logging in for the first time. Once complete, click "LOG IN." (Figure 1.4)

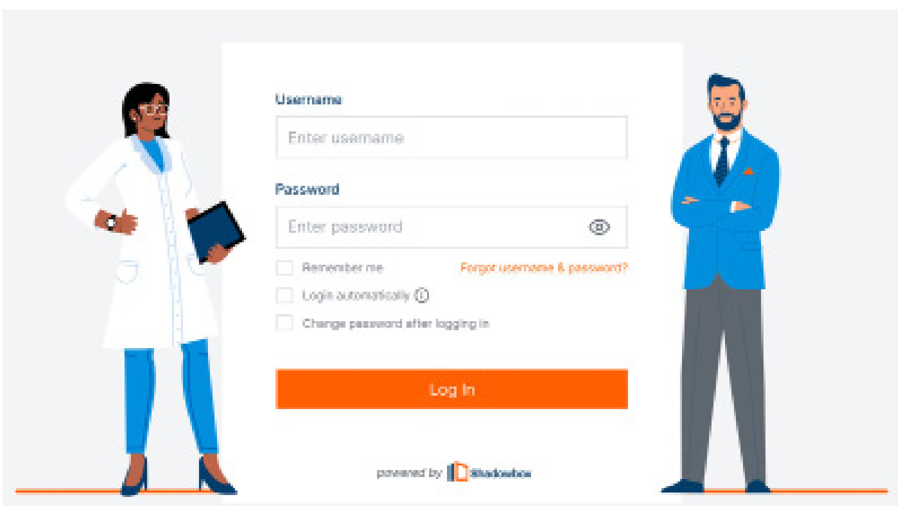

Figure 1.4 Shadowbox Login

Remember me – If checked, the application will store the Shadowbox application credentials locally on the computer.

Login automatically – If checked, this will automatically log in the user once Shadowbox is opened.

Change password after login – If checked, this will prompt the user to update their password after clicking "LOG IN." It is recommended that you update the password provided by Shadowbox upon first login.

Note: These passwords are not stored by your ancillary service provider. You may reset your Shadowbox password at any time by reaching out to Shadowbox at support@shadowbox.com.

Placing an order

To place an order, you must first access the patient's chart within the EHR displayed within the app. This generally requires searching for the patient, then clicking into the "information", "hub" or "dashboard" tab of their chart.

> **Note:** Shadowbox connects many different EHR's, and accessing the patient's chart may work differently in the EHR that you use.

When ready to order a lab, click "ORDER" in the top right-hand corner, as seen below (Figure 1.5). As a reminder, you need to have the chart open for the patient for whom you want to order a test.

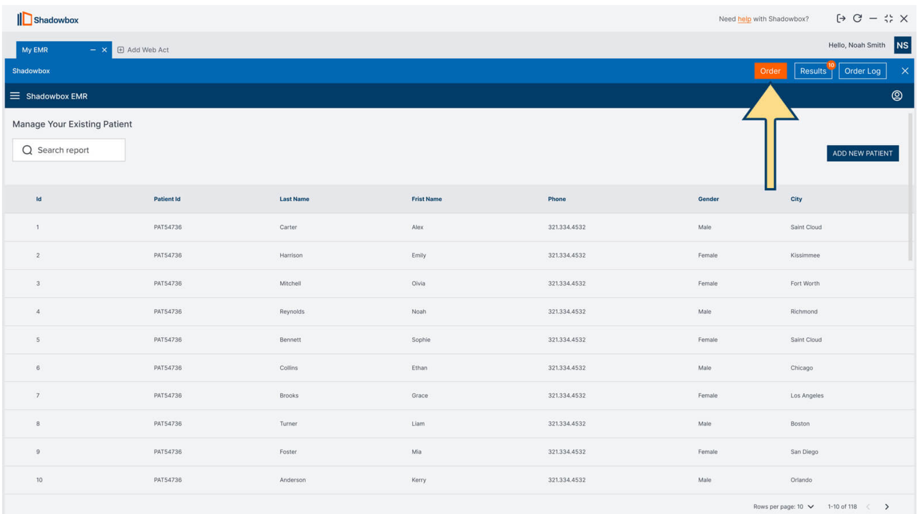

Figure 1.5 Order Button

The Shadowbox App will automatically activate the online requisition form alongside the EHR, with the EHR on the left and the online requisition form on the right. (Figure 1.6) Certain patient information will automatically transfer from the EHR to the requisition, including but not limited to patient demographic information (patient name, insurance, address, date of birth), the location, and the provider. You can place an electronic "sticky note" on the order requisition by clicking "Add Note".

> **Note:** Shadowbox is a custom-built application, and how and when information is transferred to the online requisition form may vary from customer to customer.

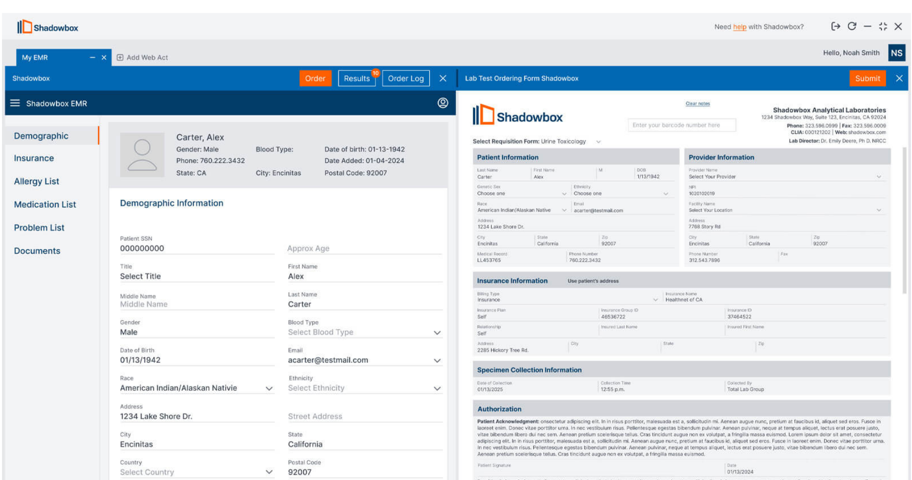

Figure 1.6 EHR and Requisition Form Split Screen

You may update the information on the form as needed. Your ancillary service provider may also offer a selection of multiple requisition forms depending on the type of test you need. To fill in the requisition form, please follow these steps:

1. **Online Requisition Form:** Using the online requisition located on the right of the screen, use the "Select Requisition Form" drop down menu to select the appropriate form, and scroll down to add the appropriate test type, test order, and diagnosis codes.

2. **Diagnosis Codes:** Please note that the application may pull over all active diagnosis codes within the patient chart into the diagnosis code section. Or your digitized requisition form may contain a button to select diagnosis codes from a list. To select diagnosis codes, click the button to display a list of active diagnosis codes in the patient's chart. Select whichever codes apply to the test order and click "OK".

3. **Medications:** The application may pull over all active medications automatically. From there, you can edit the information by adding additional medications or editing the data transferred from the chart. *Note this section is only required if it is included in your digitized requisition form. Please be sure to complete the digitized requisition as instructed by the lab, imaging center or other provider.

4. **Insurance Carrier:** The patient's insurance is automatically pulled from the patient's chart and added to the order. The information included is, the subscriber, guarantor, policy ID, and insurance name, and will only appear if active in the patient chart. Please verify all insurance information is up to date and accurate so that the lab or imaging center has the information needed prior to submitting the order. If the lab or imaging center requires a copy of the insurance card, please print and send it with the order. If you have any questions about which information is required to submit a test, please reach out to your lab or imaging center representative.

When finished, click the "SUBMIT" at the top of the screen (Figure 1.7). If the requisition is incomplete, you will be prompted to input missing information prior to submission. Once a requisition is submitted, Shadowbox will convert the order to a PDF file that will appear for you to print. The order is electronically sent to your lab or imaging center, and the PDF file is transferred to the EHR, available to download or print.

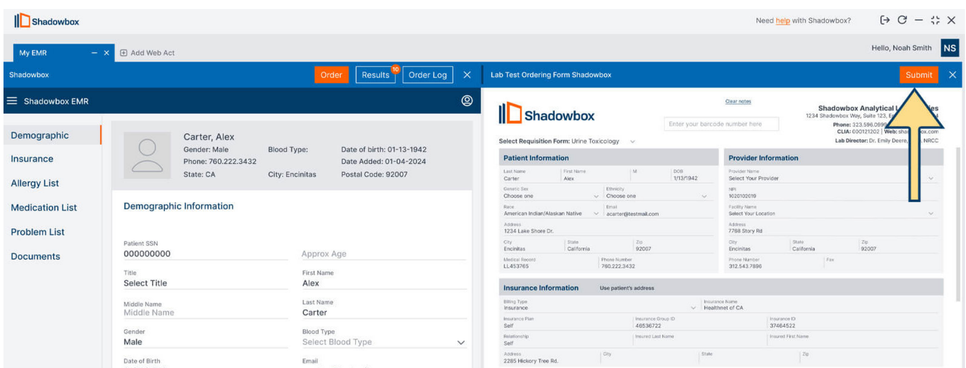

Figure 1.7 EHR & Req. Form Split Screen Submit Button

Reviewing and processing results

To view and process results, you will need to click on the results box in the top right-hand corner of the screen as shown below. (Figure 1.8)

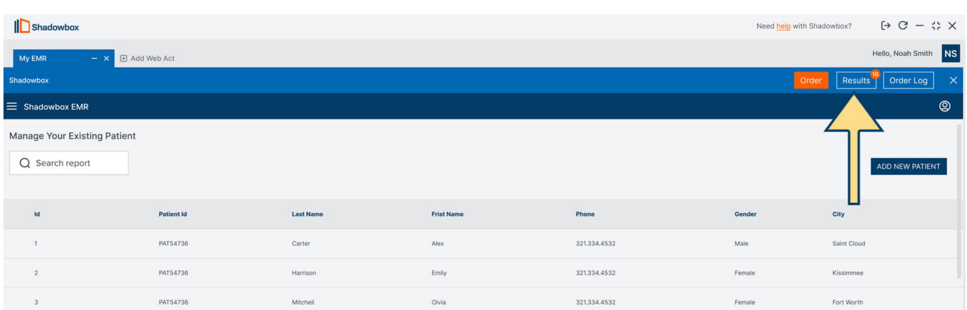

Figure 1.8 EHR Results Button

The results will load as a list on the right side of the screen, with your EHR on the left side of the screen, as shown below. (Figure 1.9).

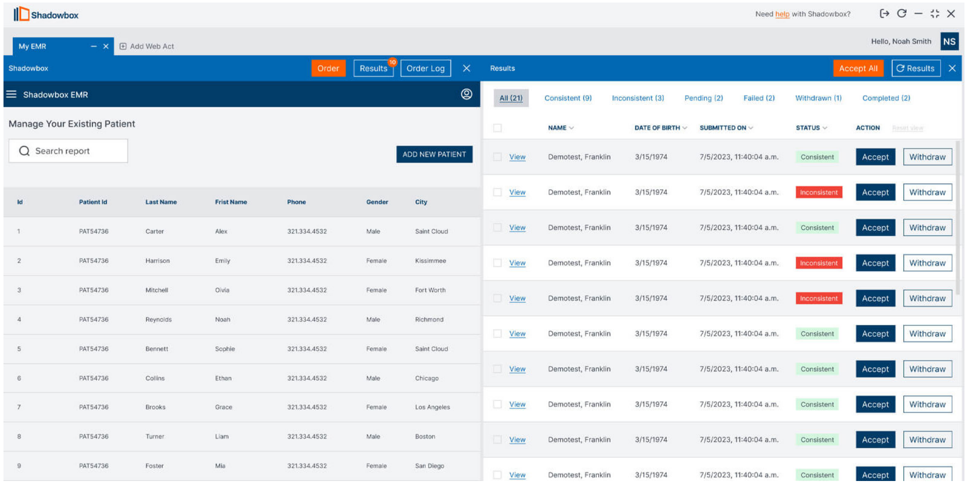

Figure 1.9 Results Split Screen

About Results Processing
You can click on the results button in the top right of the screen from any screen within your EHR. When you select results from the list of results on the right side of your screen, Shadowbox will search for the matching patient. Click view/accept or click accept to the right of a result report and the system will search for the matching patient chart and save a PDF version of the results to that patient's chart.

Please be sure to check the "Failed" tab to ensure that any results without a matching patient chart are viewed/ accepted manually. Please see the instructions below for details on how to upload results when the patient is not matched automatically.

You can **view** and **accept** results by following the instructions provided below. Shadowbox also offers a premium feature that enables fully automated results processing. Please contact our support team at support@shadowbox.com for more information.

Accept Consistent Results (Accept All):

1. Click on the Accept Consistent Results button top right. (Figure 1.10)
2. In the "Action" column, it will show as Processing, then as Accepted, and then categorized under the Completed tab in the results log with the date and time of completion.

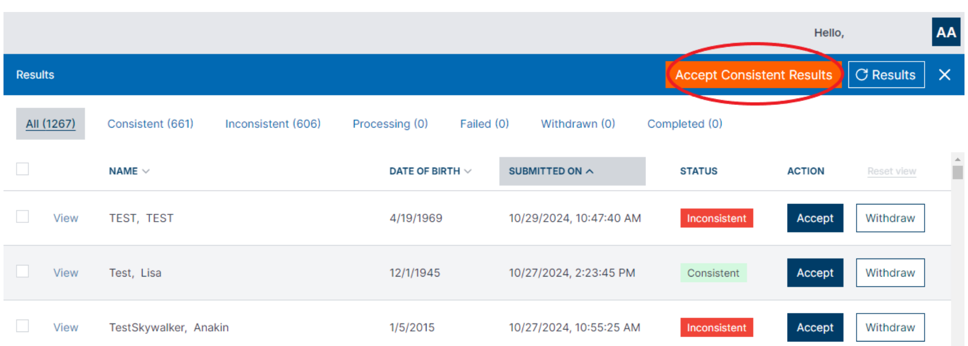

Figure 1.10 Results Log Accept All

Accept Multiple Consistent Results (Not All):

1. Click the check box to the left of each desired consistent result report. (Figure 1.11)
2. The total number of results selected will appear at the top center results log under the various categories (Example: 3 results are selected.)
3. Click on the “Accept Results” button to the right of the message.
4. In the “Action” column, it will show as Processing, then as Accepted, and then categorized under the Completed tab in the results log with the date and time of completion.

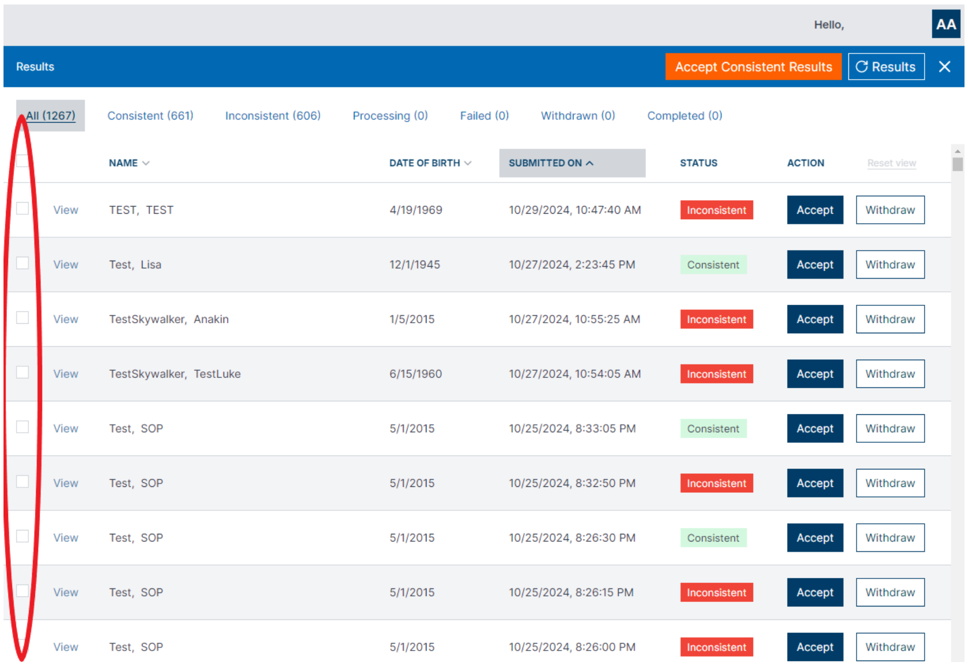

Figure 1.11 Results Log Select Boxes

Accept Multiple Inconsistent Results (Not All):

1. Click the check box to the left of each desired inconsistent results report.
2. The total number of results selected will appear at the top center results log under the various categories (Example: All 2 results are selected).
3. Click on the “Accept Results” button to the right of the message.
4. In the “Action” column, it will show as Processing, then as Accepted, and then categorized under the Completed tab in the results log with the date and time of completion.

Accept a single result to a matching patient’s chart (in view mode):

1. Click on the “Results” button.
2. Click “View” to the left of the results report.
3. System will search for the matching patient chart and if it is found, will open that patient’s chart (even if another patient chart is open at the same time, it will open the new matching patient chart, and you can use the tabs within the window to navigate between the two patient charts).
    a. Ensure the desired patient chart is the one appearing on the left of the screen.
4. Click “Accept” at the top right of the open report window.
5. Accepted will appear in the top right corner of the results log to confirm it saved successfully to the matching patient’s chart.

Accept a single result without viewing:

1. Click on the “Results” button in the top right.
2. Click “Accept” to the right of a resulted report. (Figure 1.12)
3. In the “Action” column, it will show as Processing, then as Accepted, and then categorized under the Completed tab in the results log with the date and time of completion.

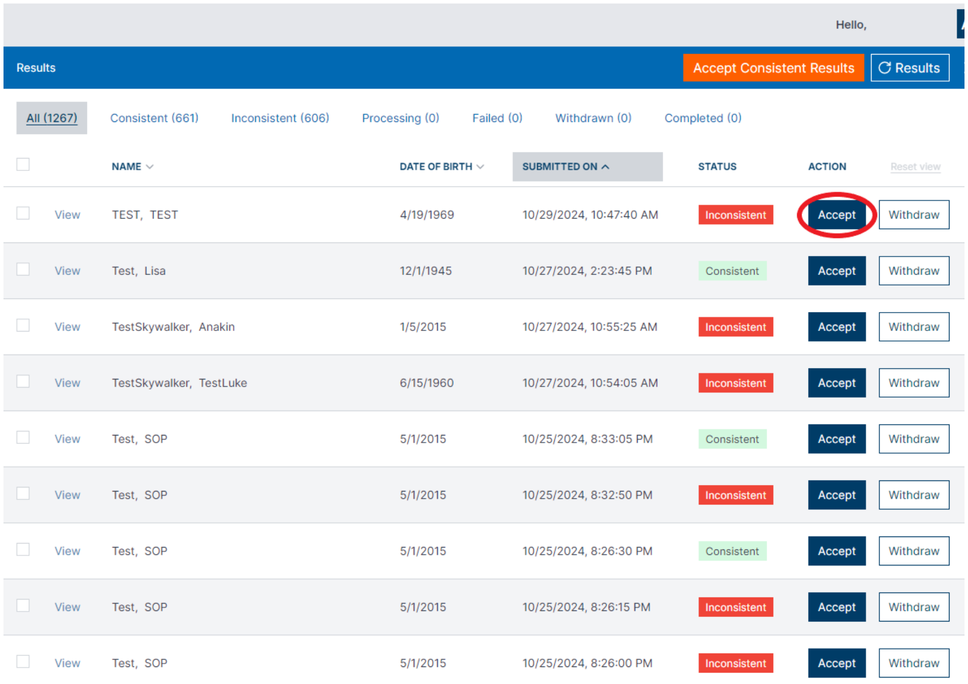

Figure 1.12 Results Log Accept Results

Accepting results when no matching patient is found:

The Shadowbox IRIS platform typically matches patient results to an existing patient chart using our automated matching feature. Shadowbox may fail to locate a patient chart automatically if the patient’s information is inconsistent across systems, such as mismatched names, or dates of birth. Additionally, technical issues like EHR system downtime or temporary internet connectivity problems can also hinder chart retrieval.

When no match is found, you can upload results to the patients’ chart manually by following these steps:

1. In the Results window, locate the result you want to upload and click “View”. (Figure 1.13)

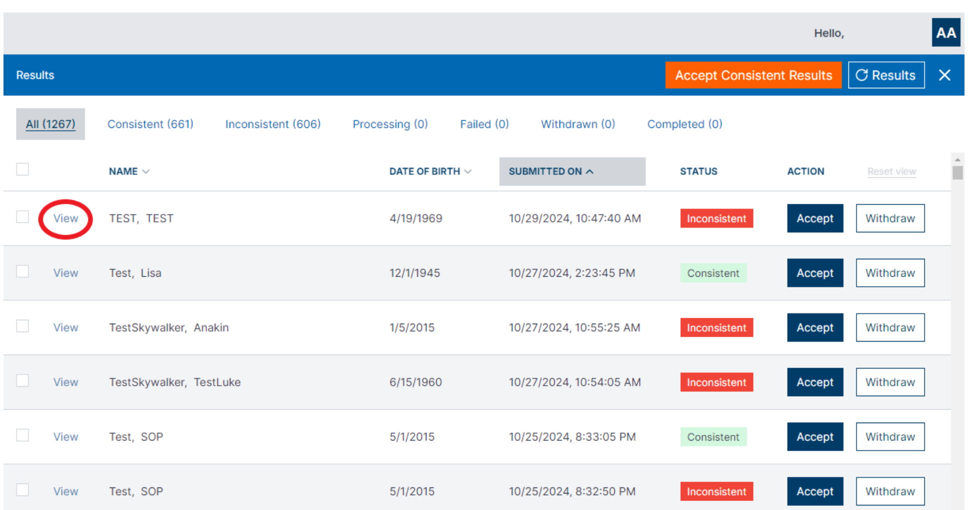

Figure 1.13 Results Log View

2. If no matching patient chart is found, a notification will appear noting that the patient was not found. Close the notification message.
3. Using the EHR application on the left side of the screen, use the search bar to locate the patient within the EHR. Once found, open the correct patient chart.
4. With the correct patient's chart open, click the "Accept" button in the "Action" column for the results line item associated with that patient to upload the result. Note: The result will be uploaded to the chart currently open. Please ensure the selected chart is correct before proceeding.
5. To confirm that the results have been uploaded, access the "Documents" tab within the EHR and validate that the new results document has been added to the list. Note that some EHRs may use a different naming convention or folder for saved documents. The result should now be successfully uploaded and visible in the patient's chart within their EHR.

Accessing end-user training & videos

Shadowbox provides user guides and videos. Our dedicated Customer Success Team will provide links for end-user training videos, guides and marketing documents via email. Please reach out to support@shadowbox.com if you need access to your training videos guides or marketing documents.