THE UNIVERSITY OF CHICAGO MEDICINE

UChicago Box Instructions for BSD

Background

As of September 2016, the UChicago Box platform has been made available for all functions of the BSD, including data storage, usage and transmission of clinical information. Use of the UChicago Box system allows for seamless collaboration and cloud storage of your important documents.

Special care and use must still be taken regarding the use of this system for Restricted data, such as medical information or personally identifiable information (social security numbers). The UChicago Box system allows for access outside of UChciago; **you are responsible for ensuring Restricted data be kept private and out of the hands unauthorized parties.**

Background 1

Access to Box 2

Folder Management 2

Types of Folders 3

Restricted Folder for Restricted Information 4

Tagging Your Restricted Folder 8

Additional Securing of Confidential or Sensitive Files 10

Uploading Files to Your Folder 12

Invite Collaborators to Your Content 13

Permissions for Collaborators 14

Sending Shared Links 16

Using Comments and Tasks 17

Special Considerations for Patient Information 18

Privacy Expectations 18

Special Practices and Advice for Box with PHI 19

Access to Box

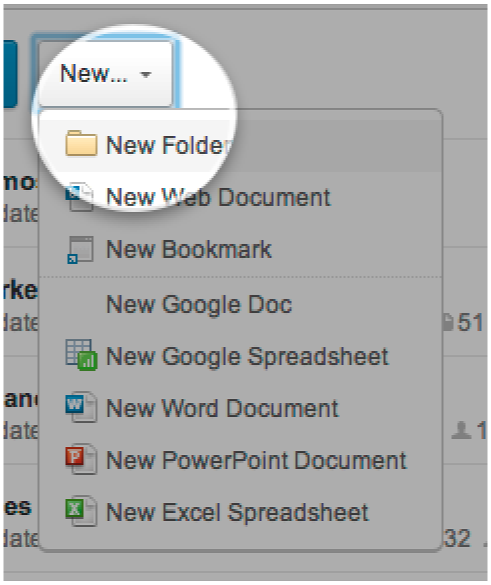
To get started, go to http://uchicago.box.com and log in with your CNETIDand password – after you do, you'll land on your All Files and Folders page.

Folder Management

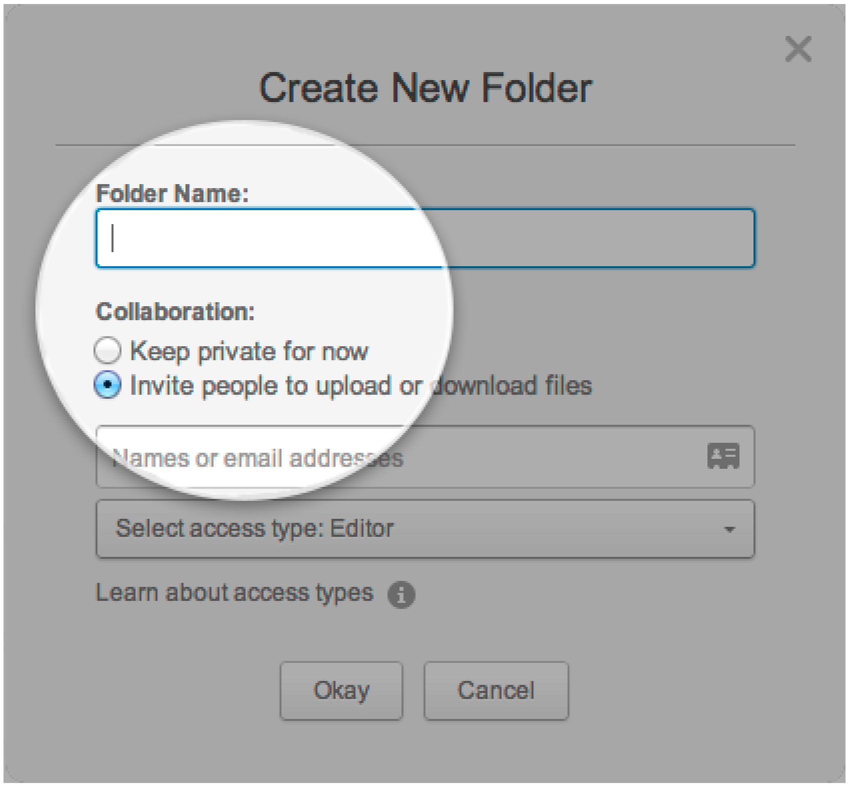
Managing your data within the Box system is important for ensuring the right sharing and permissions are set. Creating folders and managing permissions is easy, but does require that you pay special attention to what you are sharing.

To create a new folder, follow these instructions:

1. Click the **New** button and select **New Folder**



2. In the pop-up window that appears, enter the folder name. Prefer a private folder? Select **Keep private for now**. To create a folder where you'll collaborate with others, pick **Invite people to upload or download files**:



Create New Folder

Folder Name:

Collaboration:

○ Keep private for now

● Invite people to upload or download files

Names or email addresses

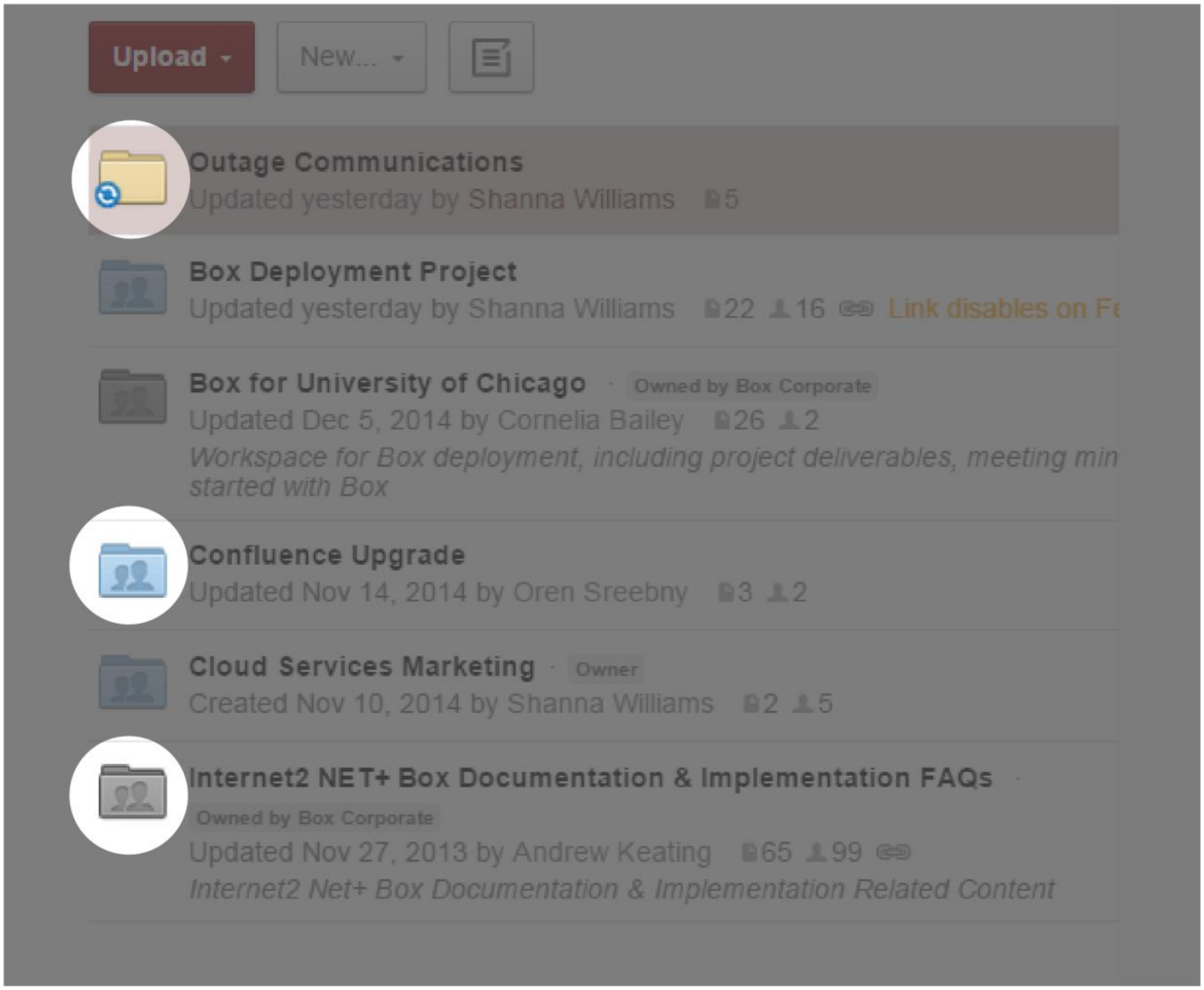
Select access type: Editor

To create sub-level folders, just click the top-level folder to open it, and repeat the steps above.

Types of Folders

When creating folders in Box, it is useful to note that there are three folder types. Yellow (or manilla) folders are private, and are viewable only by you. Blue folders are collaborative folders that are shared with others. Grey folders belong to an individual outside of UChicago.

The color of a folder will change depending on the access rights you've granted. For instance, once you invite collaborators to a folder, you'll notice that the folder changes from manila to blue.



Outage Communications
Updated yesterday by Shanna Williams 5

Box Deployment Project
Updated yesterday by Shanna Williams 22 16 Link disables on Fe

Box for University of Chicago · Owned by Box Corporate
Updated Dec 5, 2014 by Cornelia Bailey 26 2
Workspace for Box deployment, including project deliverables, meeting min started with Box

Confluence Upgrade
Updated Nov 14, 2014 by Oren Sreebny 3 2

Cloud Services Marketing · Owner
Created Nov 10, 2014 by Shanna Williams 2 5

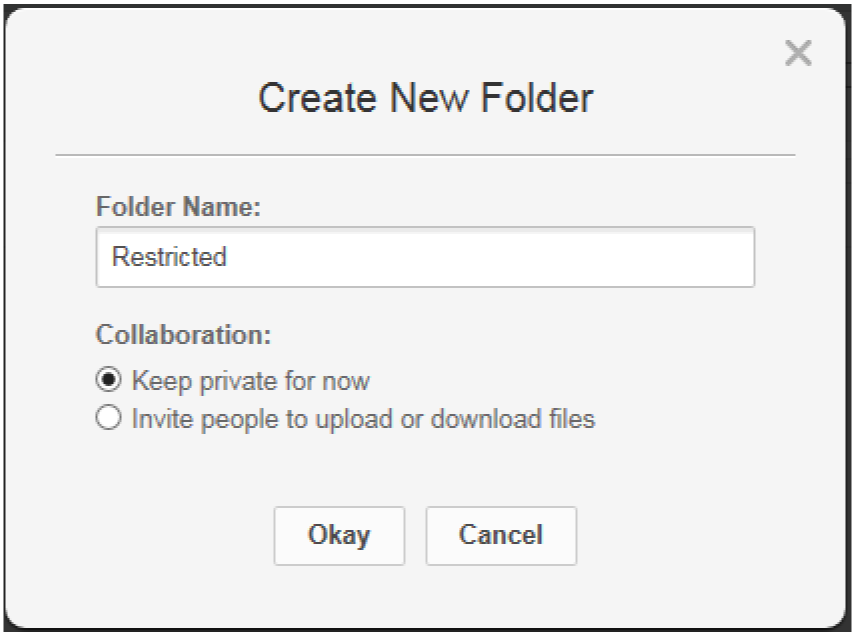
Internet2 NET+ Box Documentation & Implementation FAQs · Owned by Box Corporate
Updated Nov 27, 2013 by Andrew Keating 65 99
Internet2 Net+ Box Documentation & Implementation Related Content

Restricted Folder for Restricted Information

Each UChicagoBox user within the BSD must have a "Restricted Folder" created within there account. This folder is the only place where Restricted information, such as PHI, may be stored. The UCM Data Guardian tools will be scanning your UChicagoBox accounts for Restricted data and ensuring that it is secured within this folder.

To create a Restricted folder with the proper permissions, follow these instructions:

1. Follow the Process Above to create a new folder
2. Labelled the Folder "Restricted" and mark it to be "Keep private for now"



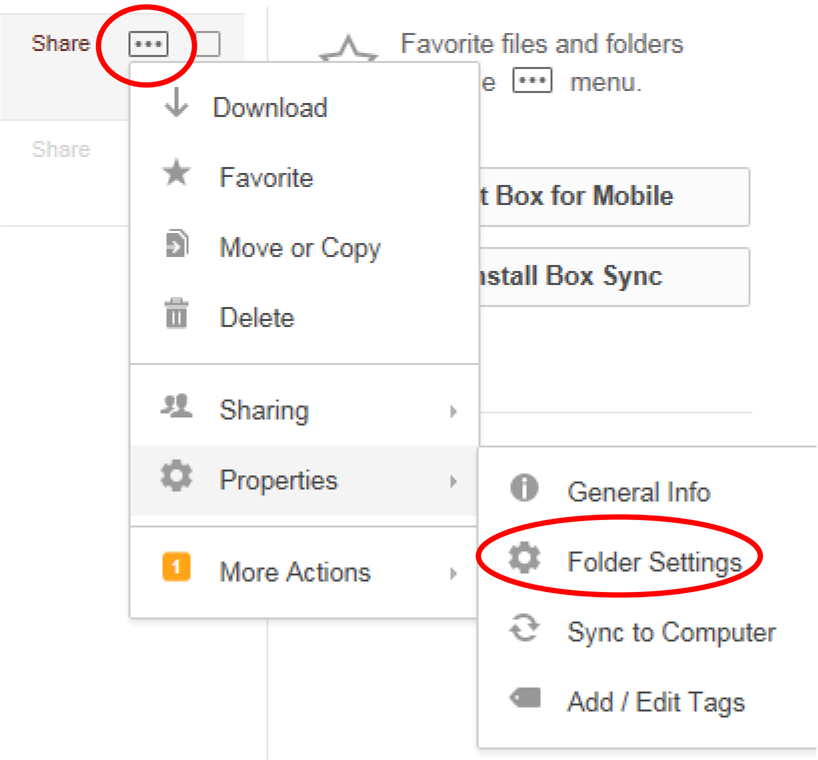
Create New Folder

Folder Name: Restricted

Collaboration:

● Keep private for now
○ Invite people to upload or download files

3. Set special Folder Permissions by going to “Folder Settings” underneath the breadcumb trail

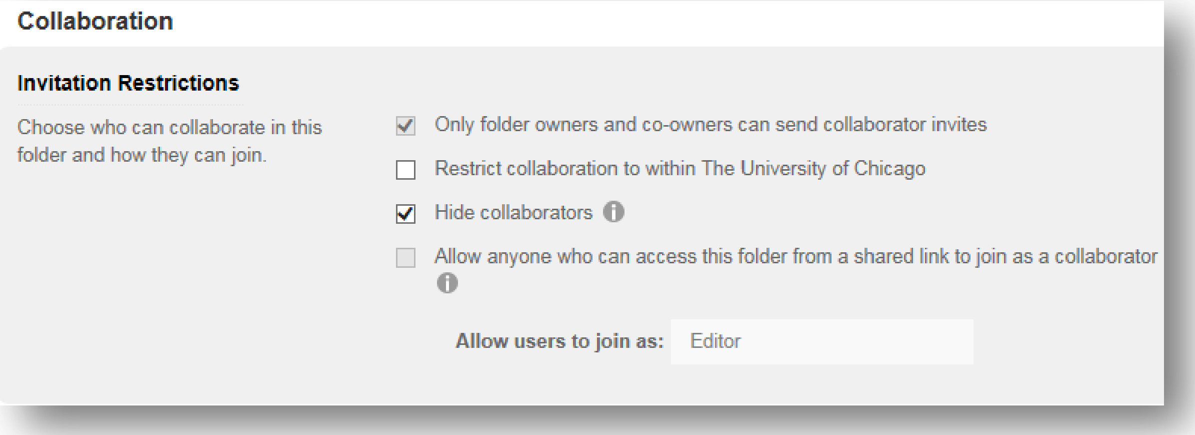


4. Ensure the following restrictions are enabled:
    a. Only folder owners and co-owners can send collaborator invites
    b. Hide collaborators
    c. Only Collaborators can access this folder via shared links
    d. Enable watermarking for this folder
    e. Override default settings for this folder and all subfolders

i. Previews
ii. Downloads
iii. Uploads
iv. Deletes
v. Adds a comment

5. Hit **Save Changes** to ensure the folder permissions have been saved.

The screenshots below describe how your folder should be set.



Collaboration

Invitation Restrictions

Choose who can collaborate in this folder and how they can join.

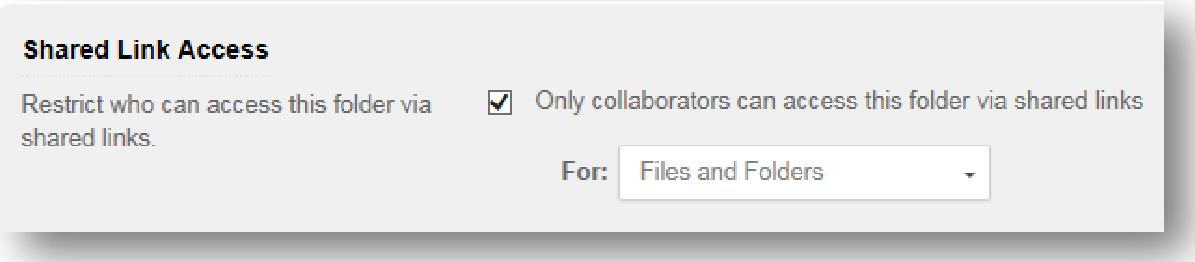
☑ Only folder owners and co-owners can send collaborator invites

□ Restrict collaboration to within The University of Chicago

☑ Hide collaborators

□ Allow anyone who can access this folder from a shared link to join as a collaborator

Allow users to join as: Editor

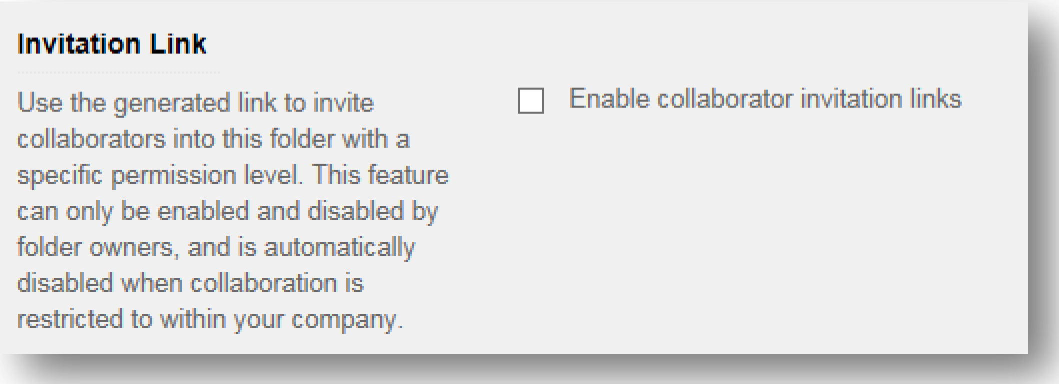


Shared Link Access

Restrict who can access this folder via shared links.

☑ Only collaborators can access this folder via shared links

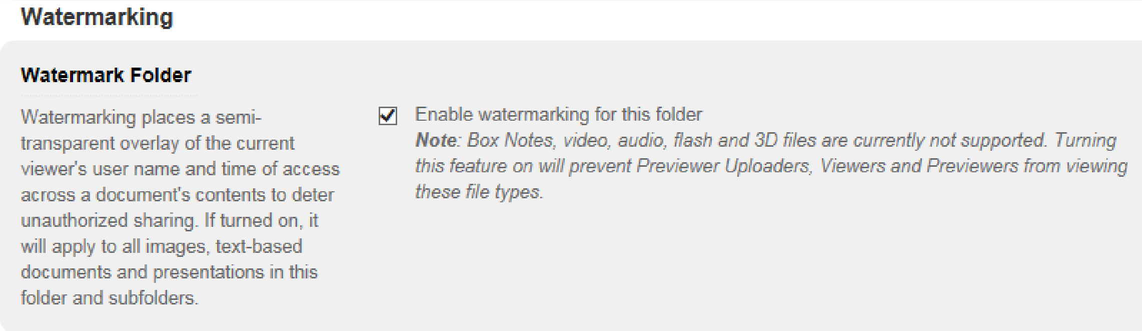
For: Files and Folders



Invitation Link

Use the generated link to invite collaborators into this folder with a specific permission level. This feature can only be enabled and disabled by folder owners, and is automatically disabled when collaboration is restricted to within your company.

□ Enable collaborator invitation links



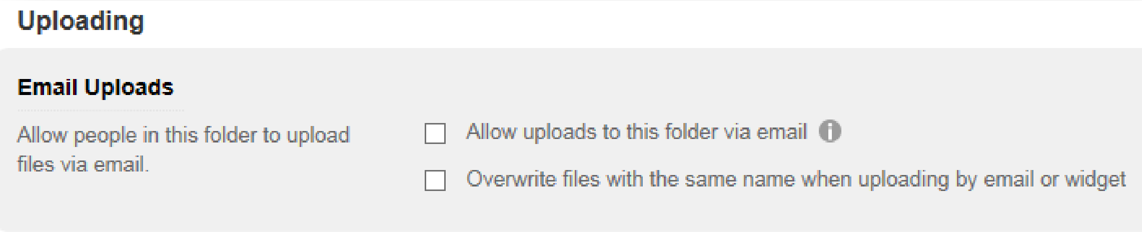
Watermarking

Watermark Folder

Watermarking places a semi-transparent overlay of the current viewer's user name and time of access across a document's contents to deter unauthorized sharing. If turned on, it will apply to all images, text-based documents and presentations in this folder and subfolders.

☑ Enable watermarking for this folder

***Note**: Box Notes, video, audio, flash and 3D files are currently not supported. Turning this feature on will prevent Previewer Uploaders, Viewers and Previewers from viewing these file types.*



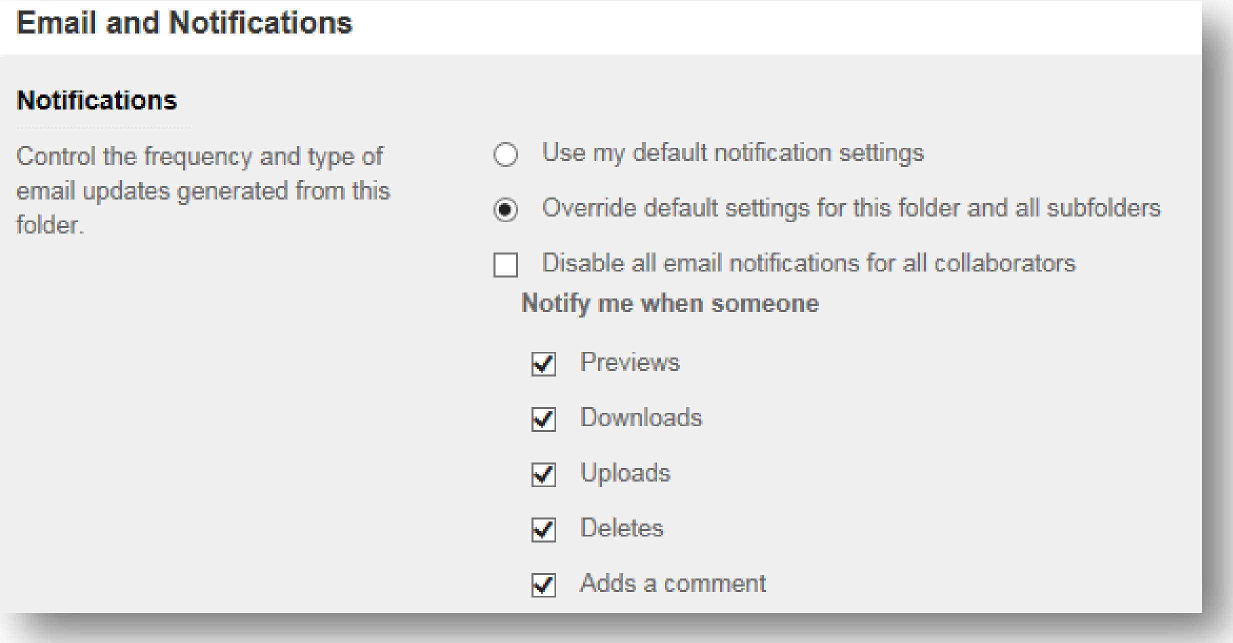
Uploading

Email Uploads

Allow people in this folder to upload files via email.

□ Allow uploads to this folder via email ⓘ

□ Overwrite files with the same name when uploading by email or widget



Email and Notifications

Notifications

Control the frequency and type of email updates generated from this folder.

○ Use my default notification settings

● Override default settings for this folder and all subfolders

□ Disable all email notifications for all collaborators

Notify me when someone

☑ Previews

☑ Downloads

☑ Uploads

☑ Deletes

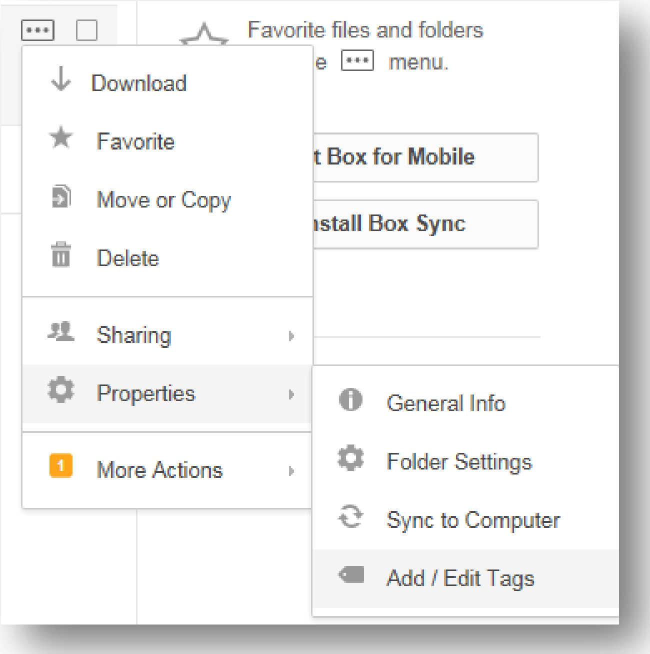
☑ Adds a comment

Tagging Your Restricted Folder

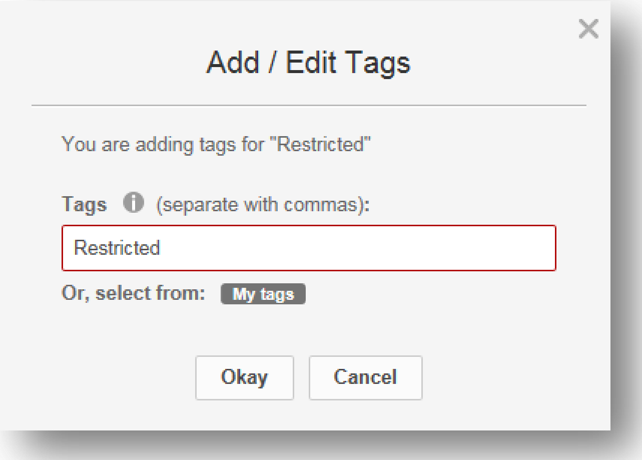
Following the same process for creating a Restricted folder, you must make sure that you have tagged the folder as **Restricted**. Doing so informs all parties that the information associated to this is highly sensitive and needs the utmost care.

Follow these instructions for tagging your Restricted Folder.

1. Select **Add/Edit Tags** under … -> Properties -> Add/Edit Tags by the folder



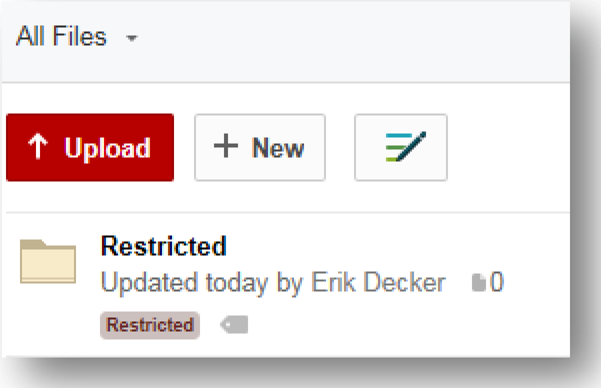
2. Label the tag as **Restricted**


Add / Edit Tags

You are adding tags for "Restricted"

Tags (separate with commas): Restricted

Upon proper tagging, the folder will show as being **Restricted**



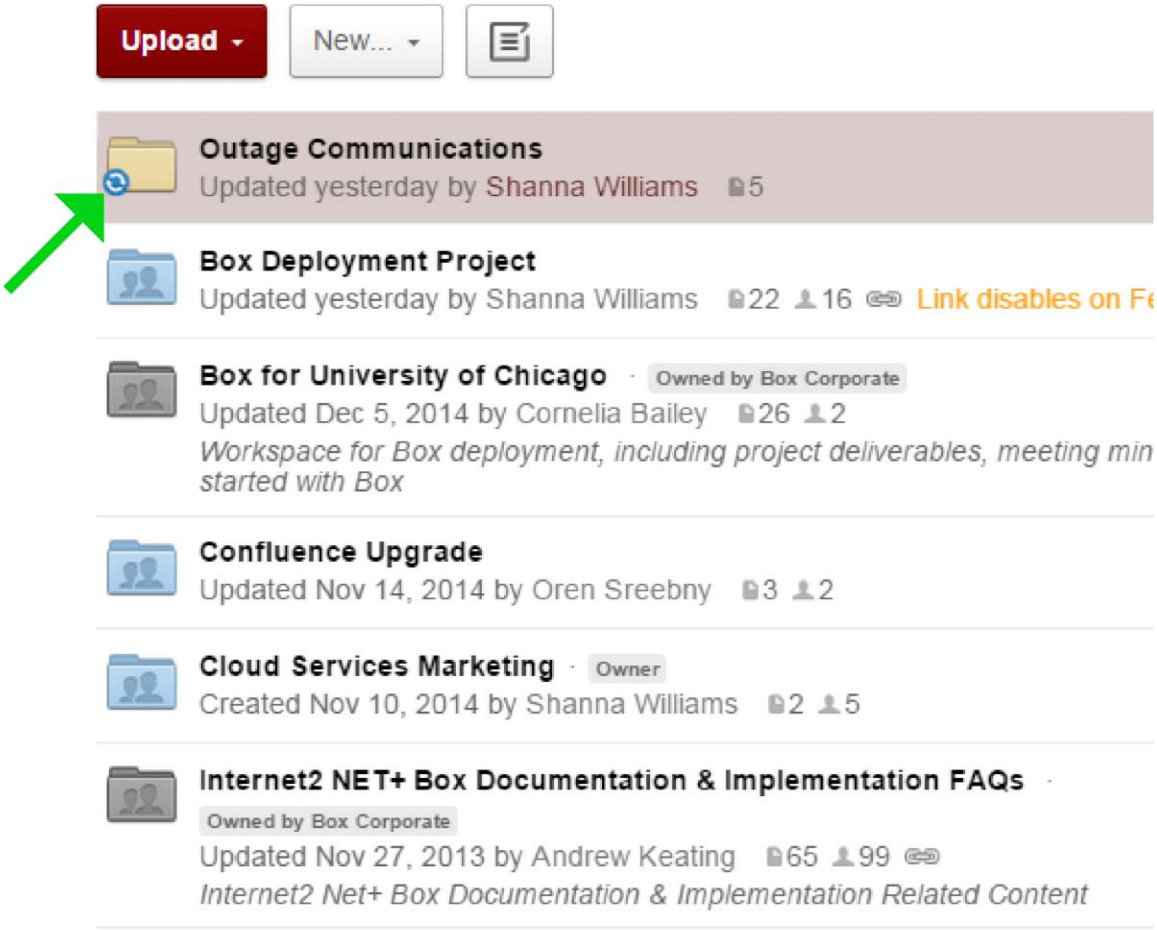
Additional Securing of Confidential or Sensitive Files

While UChicagoBox is approved for FERPA and HIPAA data, precautions must be taken with files that contain this kind of information, especially if you choose to utilize the Box Sync app.

- Once downloaded, Box Sync will continuously sync online versions of documents with those saved to your device.
- If your device is ever stolen, confidential or sensitive information synced to your laptop could be accessed. Make sure your device is encrypted and password protected to protect the data in case this happens.
- **All devices used to access Restricted information must be encrypted and password protected.**

If you are storing sensitive or confidential information in a folder, it is in your best interest to **disable the Sync function** for this particular folder. This way, if your laptop is ever stolen or otherwise compromised, the perpetrator will not be able to access your confidential data. You are only able to access it online, after logging in with your CNetID and password.

Synced folders show a small, blue sync symbol at the lower left corner of the folder icon.



Outage Communications
Updated yesterday by Shanna Williams 5

Box Deployment Project
Updated yesterday by Shanna Williams 22 16 Link disables on Fe

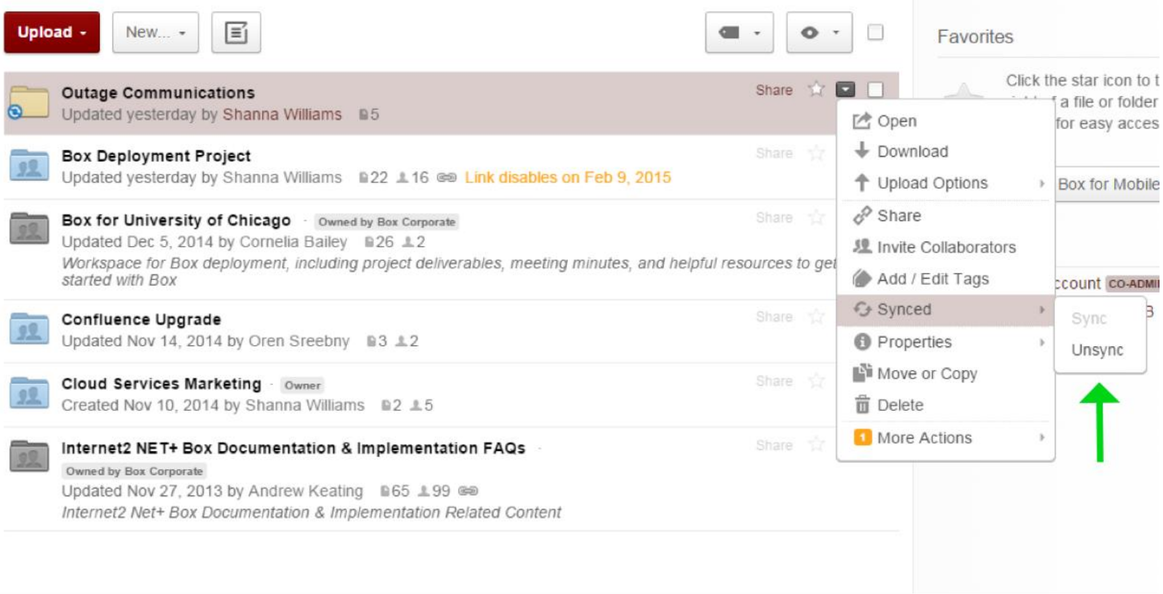
Box for University of Chicago · Owned by Box Corporate
Updated Dec 5, 2014 by Cornelia Bailey 26 2
Workspace for Box deployment, including project deliverables, meeting min started with Box

Confluence Upgrade
Updated Nov 14, 2014 by Oren Sreebny 3 2

Cloud Services Marketing · Owner
Created Nov 10, 2014 by Shanna Williams 2 5

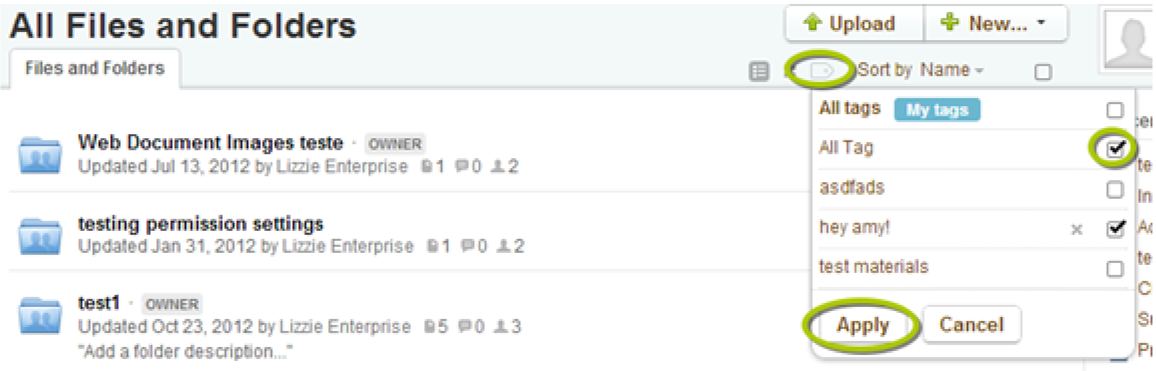
Internet2 NET+ Box Documentation & Implementation FAQs · Owned by Box Corporate
Updated Nov 27, 2013 by Andrew Keating 65 99
Internet2 Net+ Box Documentation & Implementation Related Content

To unsync a folder, click on the drop-down menu icon to the right of the folder. Open the fly-out menu next to "Synced" and click **Unsync**.


Upload
New...
Favorites
Click the star icon to t
a file or folder
for easy acces
Box for Mobile
ccount CO-ADMI
Outage Communications
Updated yesterday by Shanna Williams 5
Box Deployment Project
Updated yesterday by Shanna Williams 22 16 Link disables on Feb 9, 2015
Box for University of Chicago · Owned by Box Corporate
Updated Dec 5, 2014 by Cornelia Bailey 26 2
Workspace for Box deployment, including project deliverables, meeting minutes, and helpful resources to get started with Box
Confluence Upgrade
Updated Nov 14, 2014 by Oren Sreebny 3 2
Cloud Services Marketing · Owner
Created Nov 10, 2014 by Shanna Williams 2 5
Internet2 NET+ Box Documentation & Implementation FAQs · Owned by Box Corporate
Updated Nov 27, 2013 by Andrew Keating 65 99
Internet2 Net+ Box Documentation & Implementation Related Content
Share
Open
Download
Upload Options
Share
Invite Collaborators
Add / Edit Tags
Synced
Properties
Move or Copy
Delete
More Actions
Sync
Unsync

It is also recommended that you **tag sensitive documents as "Restricted,"** especially when you are collaborating on them with fellow colleagues. Tagging files or folders "restricted" will help your collaborators understand the nature of their contents. Tags can be created at either the file or folder level.

To create a tag, right-click on the file and choose **Add Tags**. From the pop-up window, you can add tags to a file by either creating new tags or choosing from tags already created in your account. To create multiple tags, simply separate terms with a comma.

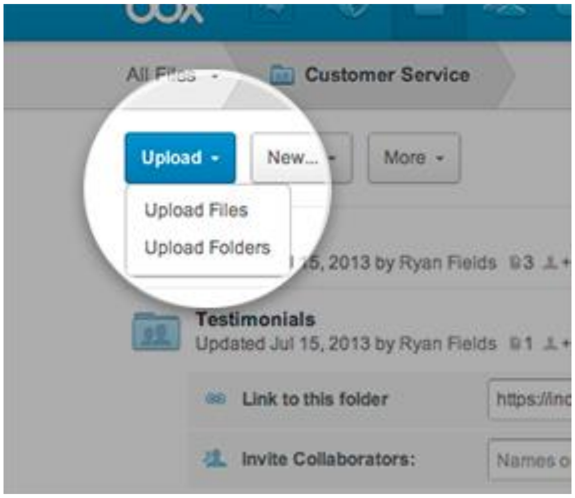

All Files and Folders
Files and Folders
Upload
New...
Sort by Name
Web Document Images teste · OWNER
Updated Jul 13, 2012 by Lizzie Enterprise 1 0 2
testing permission settings
Updated Jan 31, 2012 by Lizzie Enterprise 1 0 2
test1 · OWNER
Updated Oct 23, 2012 by Lizzie Enterprise 5 0 3
"Add a folder description..."
All tags My tags □
All Tag ☑
asdfads □
hey amy! ☑
test materials □
Apply
Cancel

Uploading Files to Your Folder

There are several ways to get your files up to Box:

- Standard Upload Files
- Upload Folders
- Drag and Drop

For individual documents, use the standard upload by clicking **Upload** at the top of the folder page, then **Upload Files.**

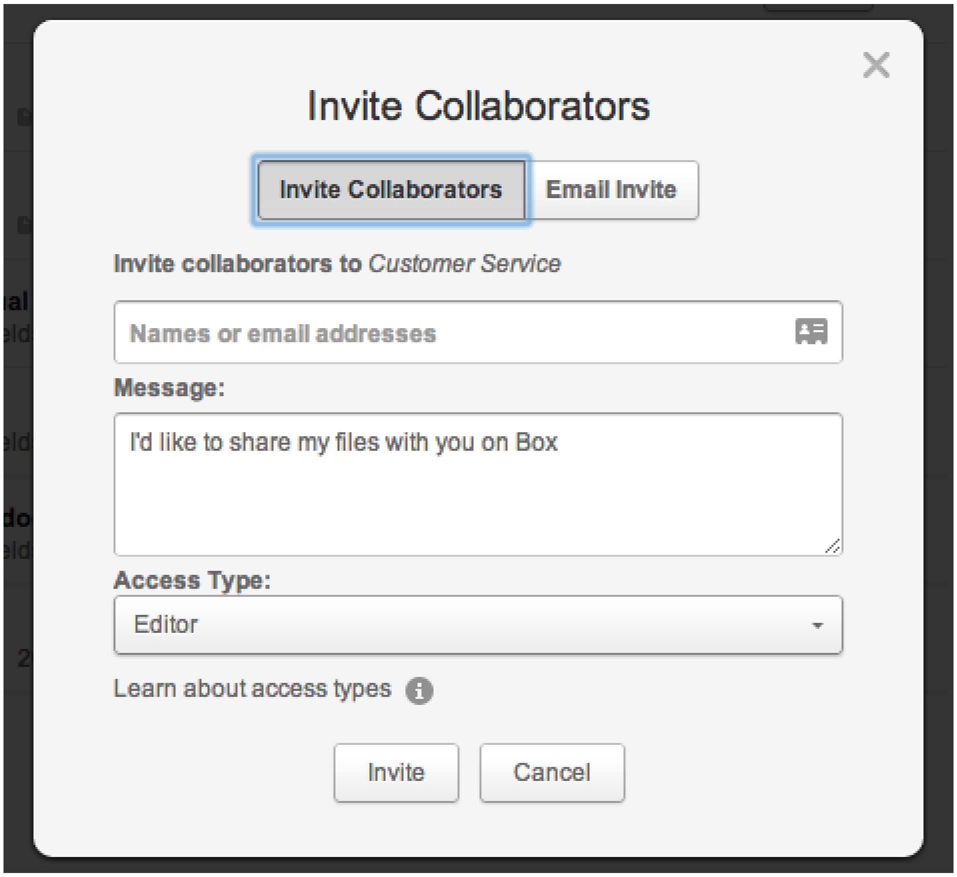


Note: Do **NOT use the "Email Files to Folder"** option to for Restricted information.

Invite Collaborators to Your Content

Collaboration in Box works at the folder level: You'll invite contacts to join one or more of your folders as collaborators, with the appropriate permission level. Collaborators can only access content in folders they have been invited to.

To start, just open your folder and click the **Invite People** button on the right side of page:



Invite Collaborators

Invite collaborators to *Customer Service*

Message:

I'd like to share my files with you on Box

Access Type: Editor

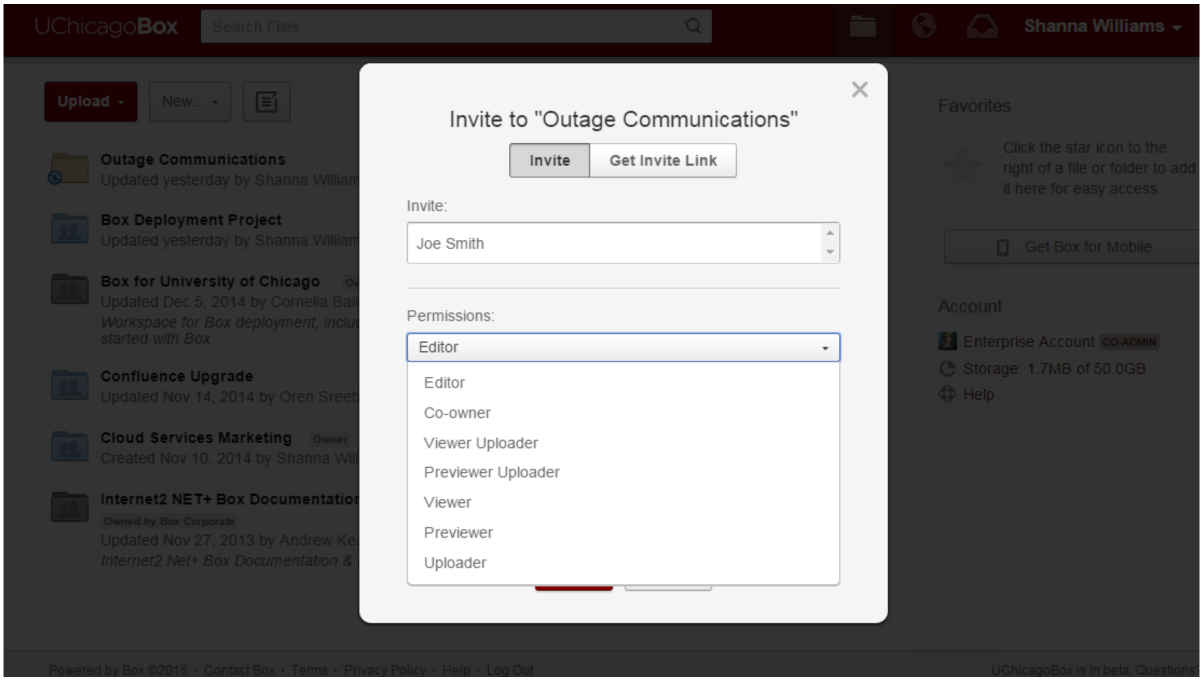
Enter your collaborators' email addresses and the access levels, then click **Invite**. You will see their name appear listed under Collaborators on the right hand side.

Permissions for Collaborators

When you invite an individual to be a Collaborator, you will be required to assign them a permission level.

Permission levels include:

- Co-owner
- Editor
- Viewer Uploader
- Preview Uploader
- Viewer
- Previewer
- Uploader

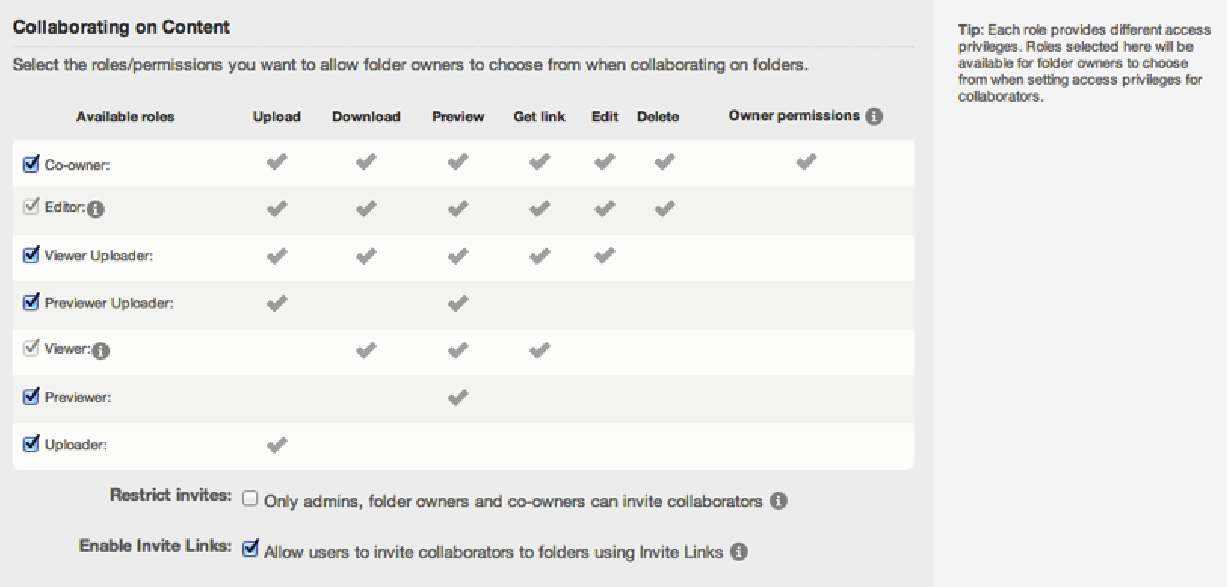


Invite to "Outage Communications"

Invite: Joe Smith

Permissions: Editor

The ability of a collaborator to view, preview, modify, or upload a new version will depend upon the level of permission you give them. The chart below shows the various abilities each permission level grants.



Collaborating on Content

Select the roles/permissions you want to allow folder owners to choose from when collaborating on folders.

Available roles	Upload	Download	Preview	Get link	Edit	Delete	Owner permissions
☑ Co-owner:	✓	✓	✓	✓	✓	✓	✓
☑ Editor:	✓	✓	✓	✓	✓	✓	
☑ Viewer Uploader:	✓	✓	✓	✓	✓		
☑ Previewer Uploader:	✓		✓				
☑ Viewer:		✓	✓	✓			
☑ Previewer:			✓				
☑ Uploader:	✓						

Restrict invites: ☐ Only admins, folder owners and co-owners can invite collaborators

Enable Invite Links: ☑ Allow users to invite collaborators to folders using Invite Links

Tip: Each role provides different access privileges. Roles selected here will be available for folder owners to choose from when setting access privileges for collaborators.

NOTE: Sync is not available for Shared Folders with Collaborators who have a permission level lower than "Editor." Consider sharing links with these individuals instead, as sharing links remain the same when new file versions are uploaded.

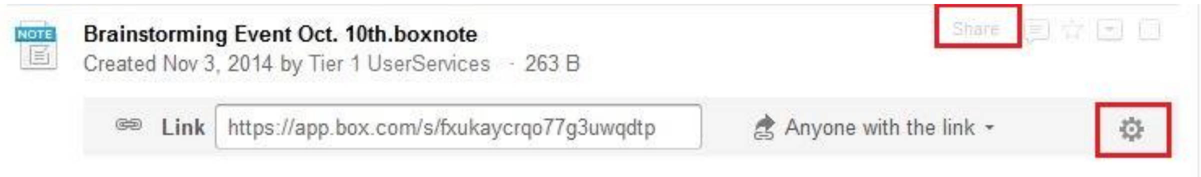
NOTE: You may **NOT** use the **Shared Link** option for the **Restricted**. The Shared Link option is essentially an "open access share"; you will not be able to ensure the only authorized users are accessing the Restricted information.

Sending Shared Links

NOTE: You cannot use Shared Links for Restricted Data

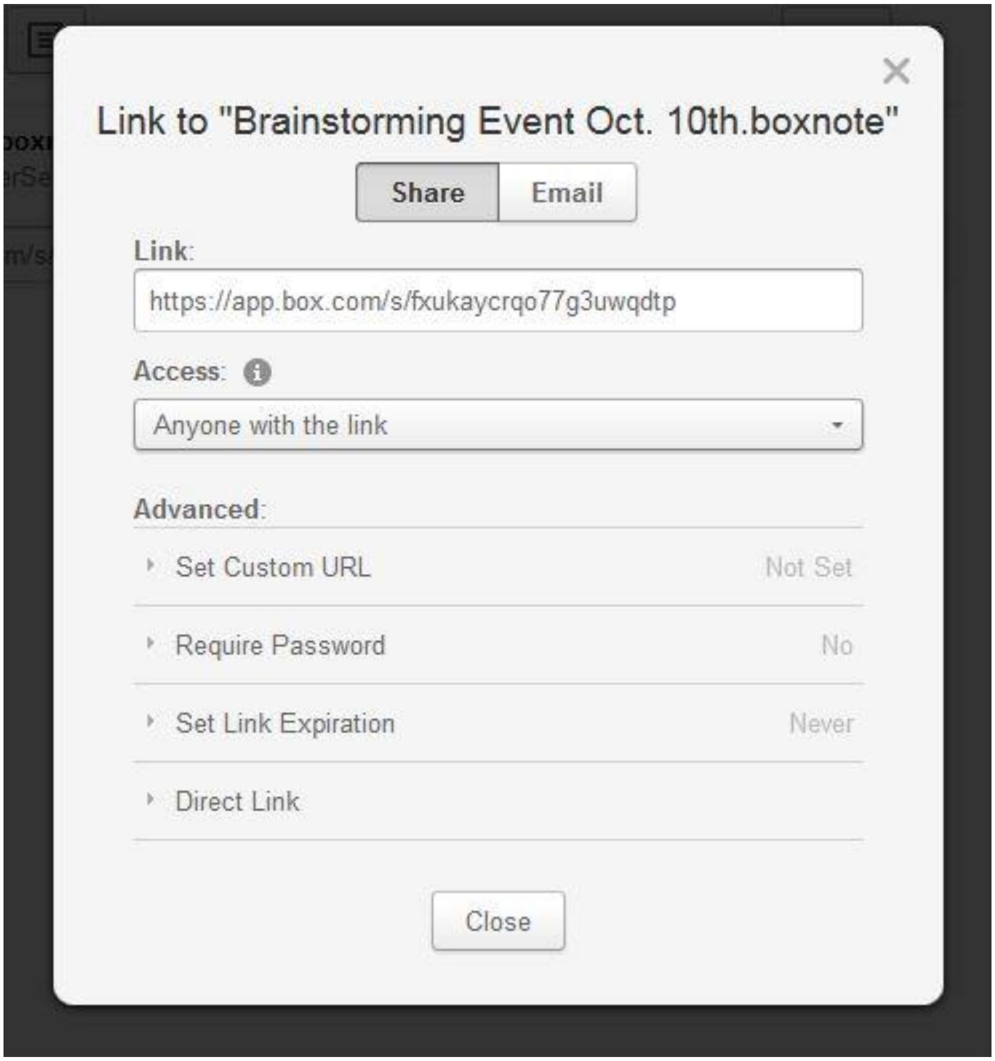
To share content with someone who does not have a Box account or only needs view files or folders, you can send them a **Shared Link**

1. To the right of the file or folder, select the Share button.
2. In the new section, you'll see a secure link to the file that lets the recipient view and download it
3. Next to the link, you will see a gear wheel icon where you can choose advanced settings and restrictions.
4. Either copy the link or send an email notification directly by clicking on the gear icon > email.



Brainstorming Event Oct. 10th.boxnote
Created Nov 3, 2014 by Tier 1 UserServices · 263 B

Link https://app.box.com/s/fxukaycrqo77g3uwqdtp



Link to "Brainstorming Event Oct. 10th.boxnote"

Link: https://app.box.com/s/fxukaycrqo77g3uwqdtp

Access: Anyone with the link

Advanced:

Set Custom URL: Not Set

Require Password: No

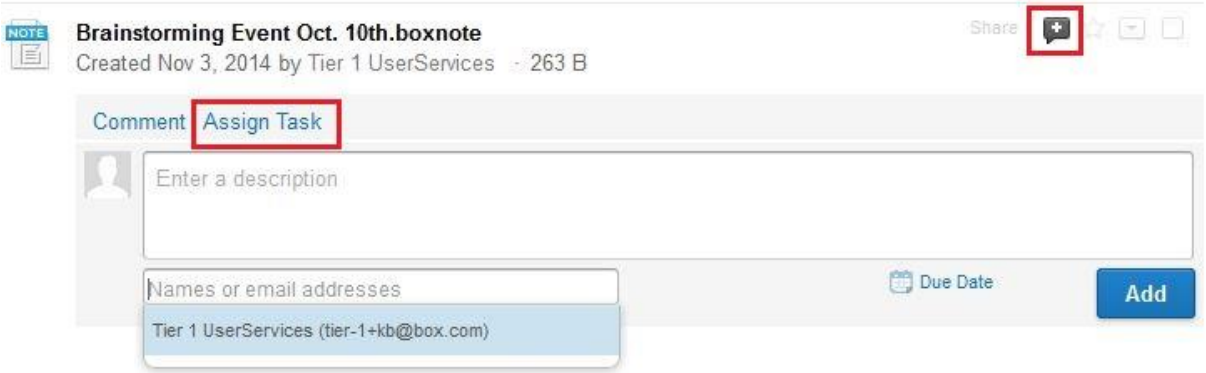
Set Link Expiration: Never

NOTE: It is advisable to set a password and a link expiration for every Shared Link you create. This way you can ensure the access is time limited.

Using Comments and Tasks

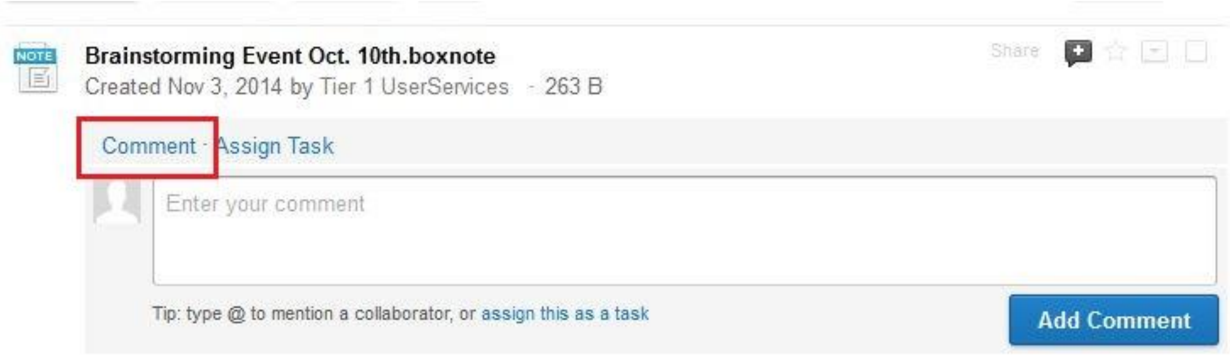
Now that you have invited collaborators, you can work together on your content through comments and tasks.

- Example: Instead of sending your coworker an email asking for feedback on a file, create a task for them to organize and track your project in Box.
- Click the talk bubble next to the file > select **Assign Task** and @mention your collaborator.
- Include what you need taken care of, and assign it to your collaborator. You can even set a due date or add comments if necessary. Don’t forget to click **Add.**



Brainstorming Event Oct. 10th.boxnote
Created Nov 3, 2014 by Tier 1 UserServices · 263 B

- Use the **Comments** feature to keep conversations about the file tidied up next to that content and out of email.
- To add a comment that will be visible to your collaborators, click the talk bubble and select **Comment** and click **Add**



Brainstorming Event Oct. 10th.boxnote
Created Nov 3, 2014 by Tier 1 UserServices · 263 B

Tip: type @ to mention a collaborator, or assign this as a task

Special Considerations for Patient Information

Special care and diligence must be practiced when working with any patient information. This applies to patient information used for clinical care, research or education purposes. BSD employees must still ensure they continue to abide by the UCM HIPAA Privacy and Security policies.

UChicago Box may not be used by UCMC employees.

As a reminder, please ensure the following are completed.

Privacy Expectations

- You are not permitted to share PHI with unauthorized individuals. Sharing inside of the UCM is permitted as long as the receiving party has a need to know
- You are still bound by any research protocol or clinical requirement when using the UChicago Box system. The use of this system does not absolve you from those requirements.
- The UChicago Box system cannot be used as the primary system for clinical documentation; EPIC must be used for documenting into the medical record.

- Recall that PHI is any information that contains the 18 personal identifiers combined with any past, present or future health information. This includes common fields such as MRN or Dates (date of birth, date of service, date of discharge, etc).
    - **NOTE: Even if your data set only contains an MRN and health information it is still PHI. Special care must be taken.**
- If you accidentally share PHI with an unintended or unauthorized party, make sure to follow these steps immediately:
    - Revoke the sharing permissions
    - Issue a remote wipe, or a remote delete, if possible, to recover the PHI
    - Notify the UCM Office of Corporate Compliance by calling the Compliance Hotline at 773-834-9716
- If you are a BSD employee and collaborating with a Non-BSD faculty member within the UChicago system, you are **not** permitted to share PHI with the other party. You may only share de-identified information. This restriction is in place due to the definition of the UChicago Organized Health Care Arrangement (OHCA). PHI may only be shared within UChicago between the BSD and UCMC.

Special Practices and Advice for Box with PHI

- Be conscience of the data you place in your Box folders; do not place PHI in public shares
- Make sure you create a Restricted folder within your Box account, and follow the instructions for setting up the permissions appropriately. This folder should be used for the storage of your Restricted information.
- All devices that you use to connect to your Box account must be encrypted. This includes desktops, laptops and mobile devices. Instructions on how to encrypt your devices can be found on the BSD Information Security Office website: http://security.bsd.uchciago.edu/encryption
- All BSD users must enroll in Two Factor Authentication when enabling their Box access. Enroll by navigating to https://2fa.uchicago.edu
- It is highly advisable to **not** use the *Box Sync* function for the folders that contain your Restricted Information. Using this Sync function will move the Restricted information onto the devices that are set up to interact with Box. Doing so could unwittingly copy Restricted information onto insecure devices, such as a home personal computer.
- Do **NOT** use the *Shared Link* option within Box for inviting Collaborators to your shared folder. Instead, explicitly invite individuals and require them to set up Box accounts for access.
- The BSD and UCM Information Security Offices apply special tools to check for PHI in insecure locations within your Box account. If PHI is discovered in a potentially insecure location, such as a public share, it will automatically be quarantined and removed from that location, and moved into your Restricted folder. You will be notified of the policy violation through an email and reminded to secure your Restricted information in secure locations.