

Box.com Setup and Tips

September 2023



Box Accounts and Connect for Health Colorado®

The Connect for Health Colorado® Assistance Network (AN) Team uses Box.com to share documents and information.

When a new Program Manager (PM) is assigned, or after a new Assister (Health Coverage Guide or Certified Application Counselor) is certified, a request must be made to the AN Team to add the new person to the appropriate shared folders.

This request is usually made by the Program Manager. If additional access is needed, please email the request to AssistanceNetwork@c4hco.com.

Box.com Access

The folders you
can access on
Box.com are
dependent on
your role

Folders Shared with Program Managers

- Health Coverage Guide and Certified Application Counselor Resources ([available here](#))
- Assistance Site-specific folder - contains application for funding, contract, work plans, enrollment outcomes reports

Folders Shared with Assisters

- Health Coverage Guide and Certified Application Counselor Resources ([available here](#))

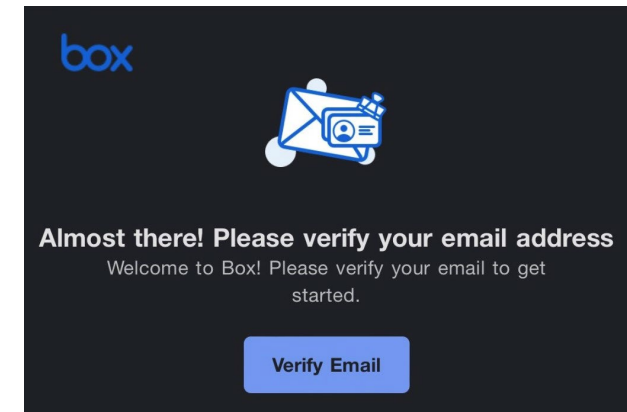
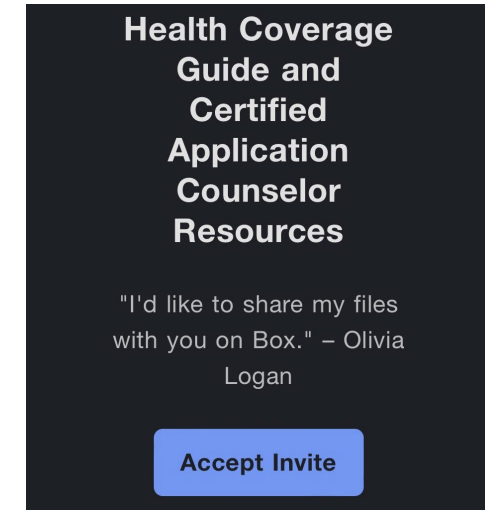
Account Set-up

After being added to a folder, **you will receive an invitation email from Box.com to access the folder**

- If email is not received, check junk mail.
- When clicking on the link in the email, you may be asked create a free account and log-in, or log-in with an existing account:
 - Only use your work-related email address
 - **Be aware log-in times out after idle time**

After setting up your username and password, you will receive another email “Please complete your Box signup” asking you to verify your email address.

- Click on the “Verify Email” button
- If link is expired, you can still log-in at [Box | Login](#) (See next slide)



Account Set-up

- If your email confirmation link has expired, you may receive this message:



This email confirmation link has expired

The link you clicked to confirm your email has expired. If you wouldn't mind: Please contact your account administrator and request them to resend the email confirmation of the account you are trying to access.

- The above message is not an issue, you should still be able to enter your new Username and Password to login:
<https://connectforhealthco.account.box.com/login>

Always click on the button “Not a part of Connect for Health Colorado”
(the blue button is for Connect for Health administrative staff only)

Part of Connect for Health Colorado?

<p>Connect for Health Colorado uses your network credentials to login to Box. Continue to login to Box through your network.</p> <p>Continue</p>	<p>If you are not a part of Connect for Health Colorado, continue to log in with your Box.com account.</p> <p>Not a part of Connect for Health Colorado</p>
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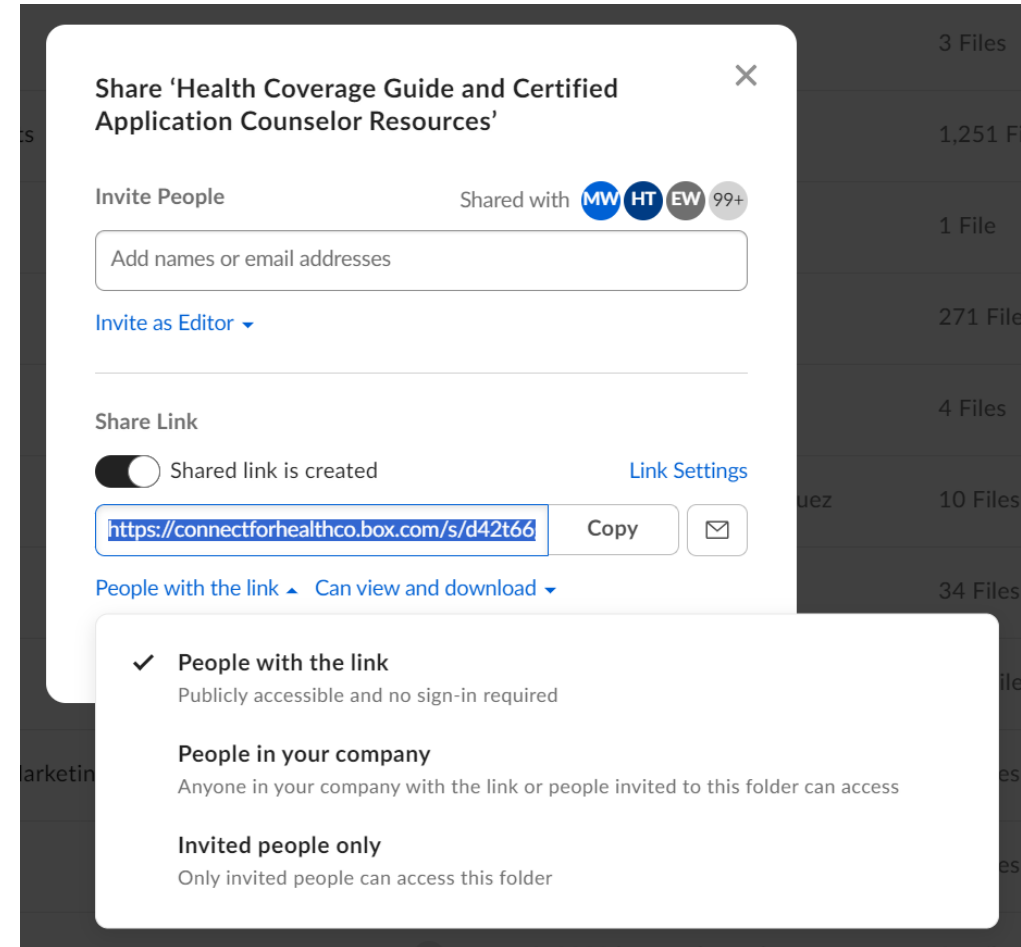
Useful Account Settings

- Disable pop-up blockers: <https://community.box.com/t5/Box-Education-Announcements-and/Disabling-Pop-Up-Blockers-For-Box-University/ba-p/12340>
- Install Box Edit for Office if you use Microsoft Office products
 - This lets you open documents from Box in the associated Office program, make edits, and save directly back to the folder.
 - If you do not install Box Edit or use Microsoft Office products, you can open documents, edit, and save directly back to the folder in the online version of the program with limited program features
- Set aside 30 minutes for Box.com training from Box University:
https://box.csod.com/LMS/catalog/Welcome.aspx?tab_page_id=-67&tab_id=-4

Managing Folders in Box

When you create folders of your own, the Assistance Network (AN) Team does not see them unless:

- You make the folder a sub-folder of an AN Team folder
- You share the folder by choosing to add a team member as a collaborator or by sharing a link
 - Levels of permissions for collaborators can be viewed here: [Understanding Collaborator Permission Levels – Box Support](#)
- When sharing by link, choose to allow people outside your organization



Managing Documents in Box

Uploading Documents/Folders

- Use upload icon or drag and drop

Editing

- Mouse over the document and click on the '3 dots' at end of the line. Click on 'open with'.
 - When editing with 'online version,' changes are real-time
 - When editing in program, changes are visible when saving document

Downloading

- Mouse over the document and click on the '3 dots' at end of the line. Choose Download, or
 - From document view, click on 'download' icon
- ***You may not have permissions enabled to download some documents

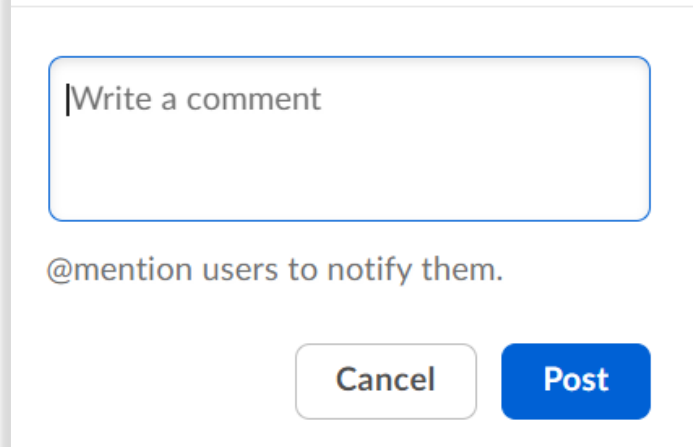
Versioning

- To upload a new version of a document, use the same document name and overwrite, or
- Click on the '3 dots' and choose Upload New Version
- Previous versions are accessible by choosing 'Version History,' in the Properties tab of the document

Communicating in Box

Comments

- Use the pane on the right side of a document to add a comment
***This will be visible to everyone who collaborates in the folder
- Use @name to draw attention to your comment from specific collaborators
 - This will send an email to the specified collaborators with the comment
 - The comment will also be visible to all collaborators in the comments panel

A screenshot of the Box comment interface. It features a text input field with the placeholder text "Write a comment". Below the input field, there is a hint text "@mention users to notify them." and two buttons: a "Cancel" button and a "Post" button. The "Post" button is highlighted in blue.

Write a comment

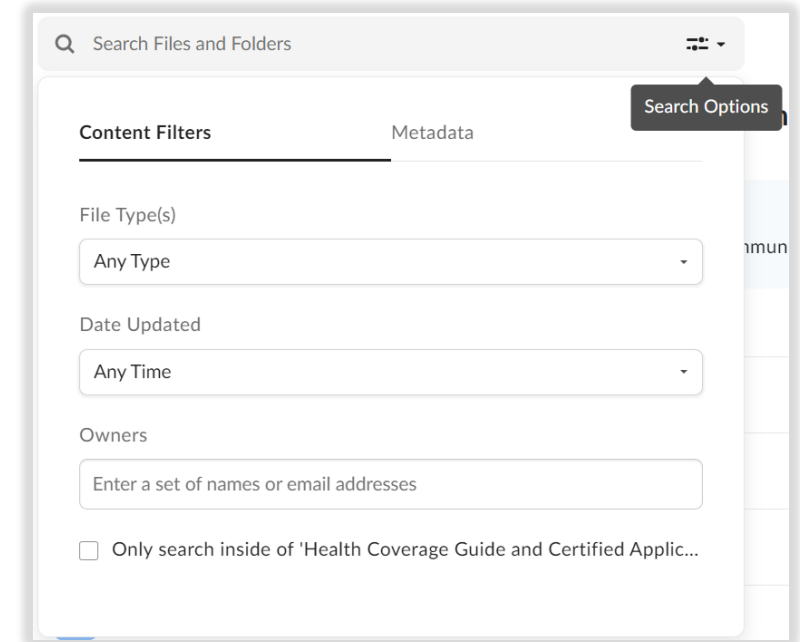
@mention users to notify them.

Cancel Post

Navigating in Box

Searching

- Start typing a search term in the search box and Box will give you suggested results
- Use the filters icon to narrow searches to file type or date modified
- Type search terms and click enter or the search icon and Box will search folder and file names, comments, and even document text to find results
 - Choose filters to narrow your results
 - Use 'AND' in your search terms to narrow results
 - Use 'Quotation Marks' around your search terms to narrow results



Questions?
Email AssistanceNetwork@c4hco.com