IMPACT – BOX FOLDER SETUP

WHO:	PI'S SEEKING ASSISTANCE FROM IMPACT
What:	Set up UTSW Box Storage Account
When:	*Before* IMPACT assistance is provided
Where:	Box Box | Login
Why:	To ensure clinical research compliance and integrity of project data

CONTENTS

About BOX:

- Box Content Management Service (UTSWBox) - IR Products and Services

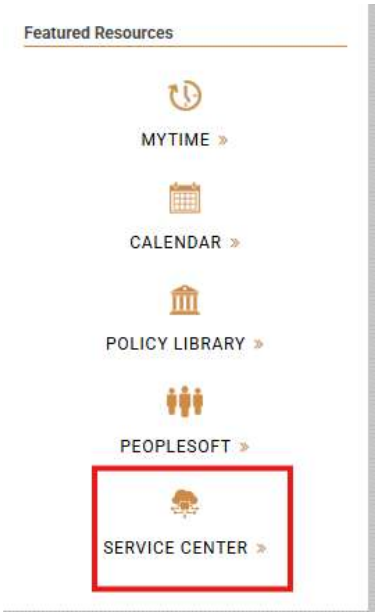
Training and Documentation:

- Getting Started with Box
- Collaborating Externally in Box
- Using Box Drive
- Box Feature and Collaboration Comparison Matrix

I. REQUEST A UTSW BOX ACCOUNT

Submit a Service Ticket via Service Now

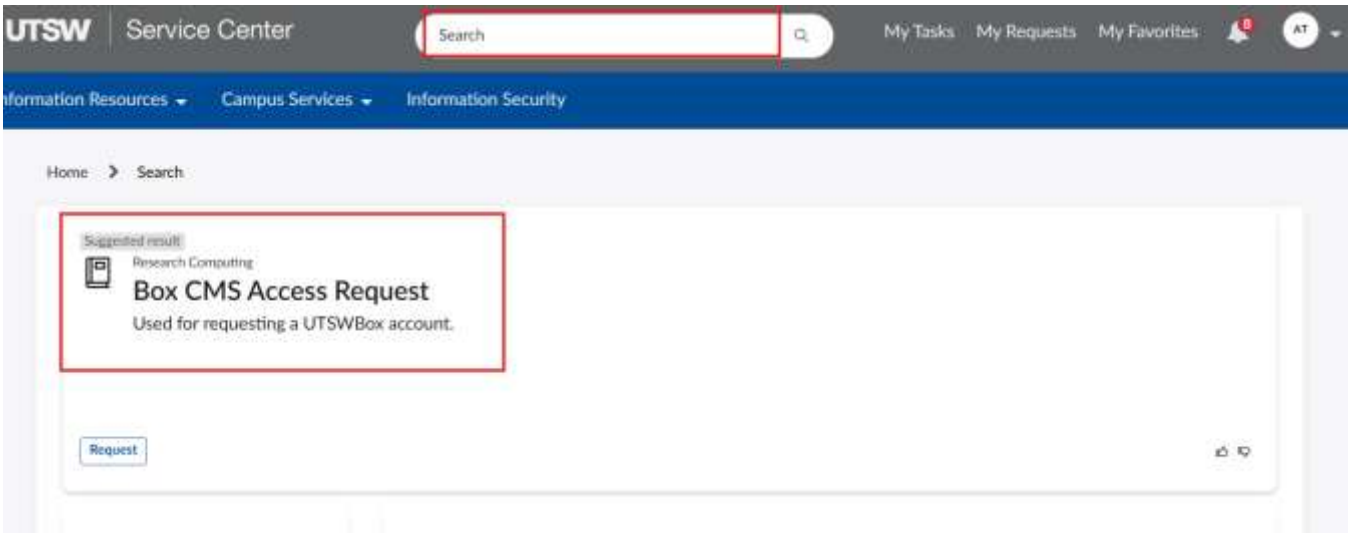
UTSW Intranet > Service Center



Accessibility note for Image 1: Image 1 shows the UTSW Intranet path to the Service Center for submitting a ServiceNow ticket. The key instruction is to open the UTSW Intranet, go to the Service Center, and begin a service ticket request.

Search: "Box CMS Access Request"

Accessibility note for Image : Image shows the ServiceNow search field where users enter "Box CMS Access Request." The key instruction is to search for the exact phrase "Box CMS Access Request" to locate the correct request form.



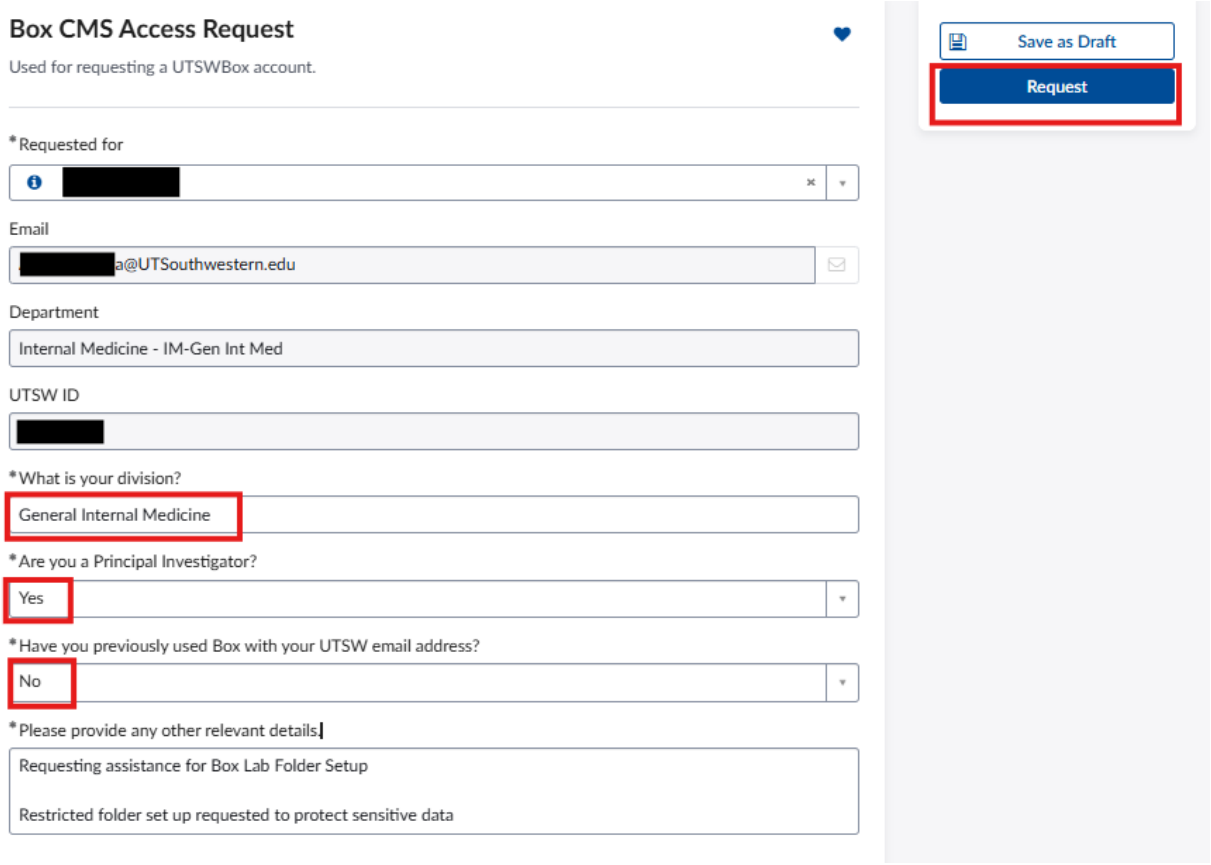
Accessibility note for Image 2: Image 2 shows the ServiceNow search result or request tile for "Box CMS Access Request." Users should select the matching Box CMS Access Request item before completing the access form.

Accessibility note for Image 2: Image 2 shows the Box CMS Access Request form in ServiceNow. The key instruction is to complete the request form for both the PI's lab Box account and each individual research team member's personal Box account.

Complete the "Box CMS Access Request" form

Requests need to be made for **BOTH** PI and each research staff member

- ☐ PI – "Lab" Box Account
  - ☐ Ex: "Dr. ABC Lab"
- ☐ Each Research Team Member – "Personal" Box Account
  - ☐ Ex: Personal – NAME



Accessibility note for Image 3: Image 3 provides an additional visual example of the Box CMS Access Request process after the form is selected. The important takeaway is that separate access requests are needed for the PI's lab Box account and for each research staff member's personal Box account.

II. EXAMPLE FILE NAMING + STUCTURE:

1. Top-Level Project Folder

This folder will serve as the root for each individual research project.

Name Format: [STU #] - [Project Title]_[YYYY]

STU #: Your internal study number or identifier (e.g., STU1234).

Project Title: A concise, descriptive title for the project (e.g., Asthma Study).

YYYY: The year the project commenced.

Example: STU 1234 - Asthma Study_2026

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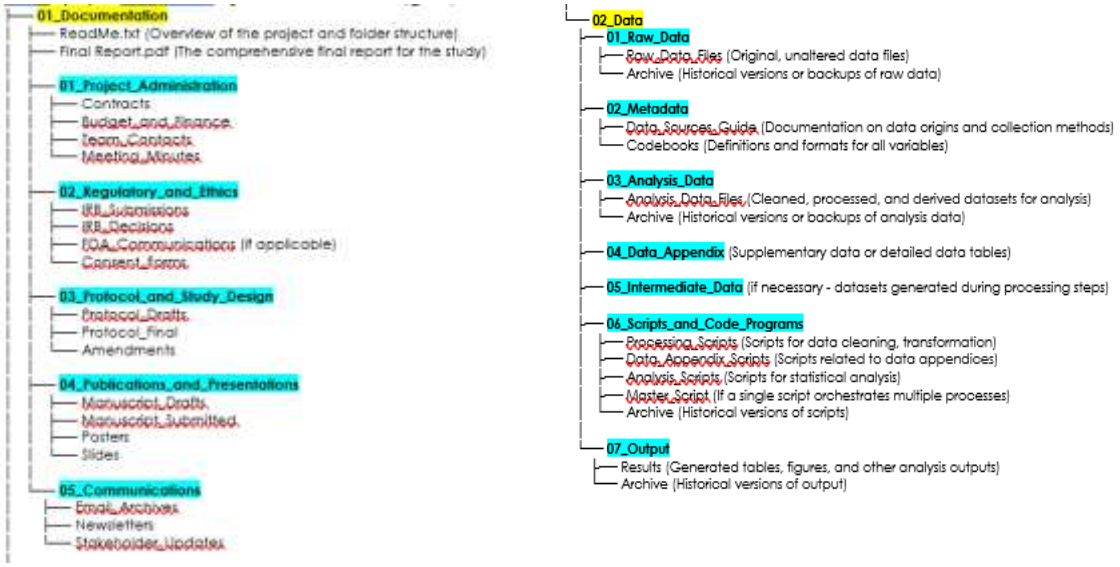
2. Second-Level Folders: Data and Documentation

Inside your top-level project folder, create two primary categories to separate data from all other project documentation.

01_Documentation AND 02_Data



Accessibility note for Image 4: Image 4 illustrates the recommended second-level Box folder structure under the top-level project folder. The project root folder should contain two primary folders: **01_Documentation** for non-data project materials and **02_Data** for research data files and data-related materials. These two folders should be created at the same level directly inside the project folder so users can clearly separate documentation from data before adding more detailed subfolders.

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3. Third and Fourth-Level Folders (within 01_Documentation)

This section will house all non-data-related project materials, organized for easy access.

Getting_Started.txt (This would be a file at the 01_Documentation level, providing an overview of the project and folder structure.)

01_Documentation

01_Project_Administration

- Contracts
- Budget_and_Finance
- Team_Contacts
- Meeting_Minutes

02_Regulatory_and_Ethics

- IRB_Submissions
- IRB_Decisions
- FDA_Communications (if applicable)
- Consent_Forms

03_Protocol_and_Study_Design

- Protocol_Drafts
- Protocol_Final

- Amendments

04_Publications_and_Presentations

- Manuscript_Drafts
- Manuscript_Submitted
- Posters
- Slides
- Final_Report (This would be a file, e.g., 20261231_STU1234_FinalReport_FINAL.pdf)

05_Communications

- Email_Archives
- Newsletters
- Stakeholder_Updates

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4. Third and Fourth-Level Folders (within 02_Data)

This section is structured to meticulously organize all data types and related research activities, directly reflecting the hierarchy from the image.

02_Data

01_Raw_Data

- Raw_Data_Files (Contains the original, unaltered data files)
- Archive (For historical versions or backups of raw data)

02_Metadata

- Data_Sources_Guide (Documentation on data origins and collection methods)
- Codebooks (Definitions and formats for all variables)

03_Analysis_Data

- Analysis_Data_Files (Cleaned, processed, and derived datasets ready for analysis)
- Archive (For historical versions or backups of analysis data)

04_Intermediate_Data (Optional folder for datasets generated during processing steps, if needed)

05_Scripts_and_Code_Programs

- Processing_Scripts (Scripts used for data cleaning, transformation, etc.)
- Data_Appendix_Scripts (Scripts related to data appendices)
- Analysis_Scripts (Scripts for statistical analysis)
- Master_Script (If a single script orchestrates multiple processes)
- Archive (For historical versions of scripts)

06_Output

- Results (Contains generated tables, figures, and other analysis outputs)
- Archive (For historical versions of output)

07_Data_Collection_Forms (This integrates elements from our previous discussion, housing CRFs, source documents, and imaging logs related to data acquisition)

08_Data_Management_Reports (Includes QC reports, data locking documentation, and other data processing records)

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5. File-Naming Conventions

To maintain consistency and version control across all files, use this format:

Name Format: [YYYYMMDD]_[ProjectID]_[DocumentType]_[Version]
YYYYMMDD: Date stamp (e.g., 20260422)
ProjectID: Matches your study identifier (e.g., STU1234)
DocumentType: A brief, descriptive tag (e.g., Protocol, CRF, Budget, AnalysisScript)
Version: v01, v02, etc., or FINAL for the definitive version.
Examples:
20260415_STU1234_Protocol_v03.docx
20260502_STU1234_CRF_v01.xlsx
20261201_STU1234_AnalysisScript_FINAL.R

III. FILE FOLDER PERMISSION + SHARING:

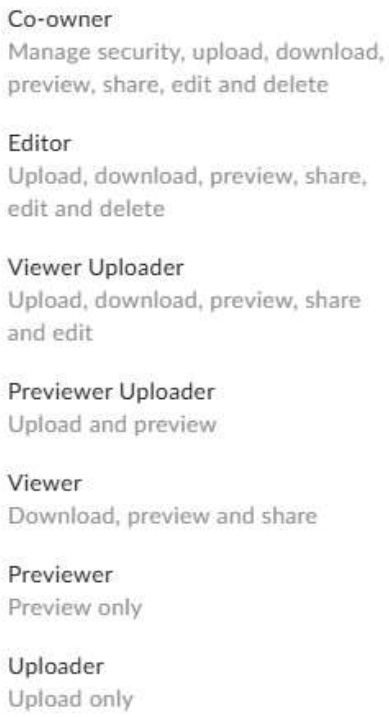
Once the folder structure is established, invite research team members. **Each team member will also need their own personal box account.**

Permission levels may vary depending on role.

Suggested Permission Levels:

- **Owner:** PI
- **Co-owner:** Project Manager / Coordinator
- **Editor:** Analyst
- **Viewer Uploader:** Intern

Definitions of UTSWBox Permission Levels:



Accessibility note for Image 5: Image 5 defines the available UTSWBox permission levels and what each role can do in a shared Box folder. Permission levels include Owner, Co-owner, Editor, Viewer Uploader, Previewer Uploader, Viewer, Previewer, and Uploader. Use the permission level that matches the person's project role and provides the minimum access needed to complete their work.

IV. CHECKLIST:

- ☐ **Create UTSW Box Account** – (I. Request UTSW Box Account)
  ****During Box set up, ask your box admin to set up a "Lab" or "Personal" account.*
  - ☐ PI – "Lab" Box Account
    - ☐ Ex: "Dr. ABC Lab"
  - ☐ Each Research Team Member – "Personal" Box Account
    - ☐ Ex: Personal – NAME

- ☐ **PI Lab Box Account**
  - ☐ Set up file structure and naming (II. Example File Naming + Structure)
  - ☐ Ask box admin to add classified files
    **** UTSW has policies that automatically classify sensitive data including Protected Health Information (PHI), Personally Identifiable Information (PII), and FERPA-regulated data.*
  - ☐ Manage folder collaborators (III. File Folder Permission + Sharing)
    - ☐ Invite research staff to appropriate files
    - ☐ Set permission statuses as needed based on role

☐ Ex: Analyst – “Editor”

****Add IMPACT Staff as needed to your projects IRB*

V. COMPLIANCE – CHECK BEFORE YOU SHARE:

Are you IRB compliant? ****Add IMPACT Team members to IRB (If applicable)*

IRB: Human Research Protection Program (HRPP) - UT Southwestern, Dallas, TX

“The Institutional Review Board is charged with the responsibility of reviewing, prior to its initiation, research involving human participants. The IRB is primarily concerned with ensuring that the rights, welfare, and privacy of human participants are protected” -UTSW IRB

What is considered PHI? What are Patient Identifiers?

Patient Identifiers

- Name
- Address
- All elements of dates (DOB, Admission Date, Exact Age if over 89, etc.)
- Telephone number
- Fax number
- Email address
- Social security number
- Medical record number
- Health plan beneficiary number
- Account number
- Certificate or license number
- Vehicle identifiers and serial numbers, including license plate number
- Device identifiers and serial numbers
- Web Universal Resource Locator (URL)
- Internet Protocol (IP) address number
- Biometric identifiers, including finger and voice prints
- Full face photos and any comparable images
- Any other unique identifying number, characteristic, or code

These identifiers represent information that is protected under the HIPAA Privacy Rule and must be treated with responsible care. If any collection of data includes even one patient identifier, it is considered PHI.

Accessibility Summary:

This page explains how to request and set up a UTSWBox account for IMPACT-supported research projects. It includes instructions for submitting a ServiceNow ticket, requesting Box CMS access, creating a standard Box folder structure, naming files consistently, assigning folder permissions, and checking compliance before sharing research materials.

To make the page easier to use with a screen reader, each instructional image has a short accessibility note that explains what the image shows and what action the user should take. The images on this page mainly support the written instructions by showing where to click in ServiceNow, how to search for the Box CMS Access Request form, how the recommended Box folder structure should look, and how UTSWBox permission levels work.

The most important information from the images is also provided in text. Users should:

- Open the UTSW Intranet and go to the Service Center to submit a ServiceNow ticket.
- Search for **"Box CMS Access Request"** and select the correct request form.
- Request access for both the PI's lab Box account and each research team member's personal Box account.
- Create a top-level project folder using the naming format **[STU #] - [Project Title]_[YYYY]**.
- Create two main folders inside the project folder: **01_Documentation** and **02_Data**.
- Use **01_Documentation** for project administration, regulatory materials, protocols, publications, presentations, communications, and other non-data project documents.
- Use **02_Data** for raw data, metadata, analysis data, intermediate data, scripts, outputs, data collection forms, and data management reports.
- Name files consistently using the format **[YYYYMMDD]*[ProjectID]*[DocumentType]_[Version]**.
- Assign UTSWBox permissions based on each person's role and use the lowest level of access needed.
- Confirm IRB, PHI, PII, FERPA, and other compliance requirements before sharing files.