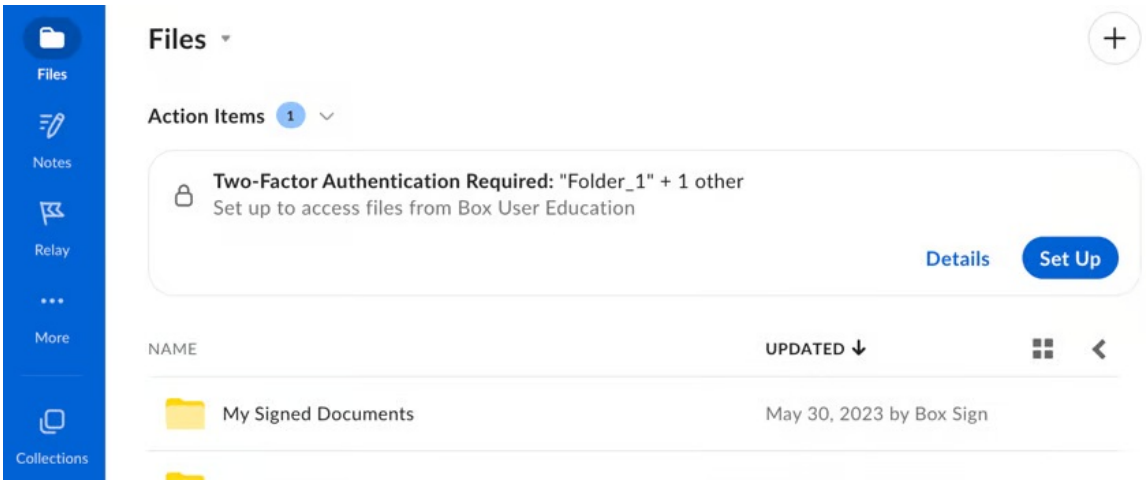
# Providing Clinical Data through Box.com - Data Migrations

Last modified on 08/18/2026 1:08 pm EDT

Customers who have a signed contract addendum for clinical data migrations are required to provide data from their previous EMR/EHR system in order to proceed with the migration process with Everhealth. Shortly after the addendum is signed, the customer will receive an invitation to collaborate on a Shared Folder via Box.com. To access this shared folder, please review the requirements below:

1. The customer must have an active Box account (which can be created **free of charge**. Upgrading to a premium/paid Box plan is NOT REQUIRED). The box account must share the same email address used to receive the invitation.

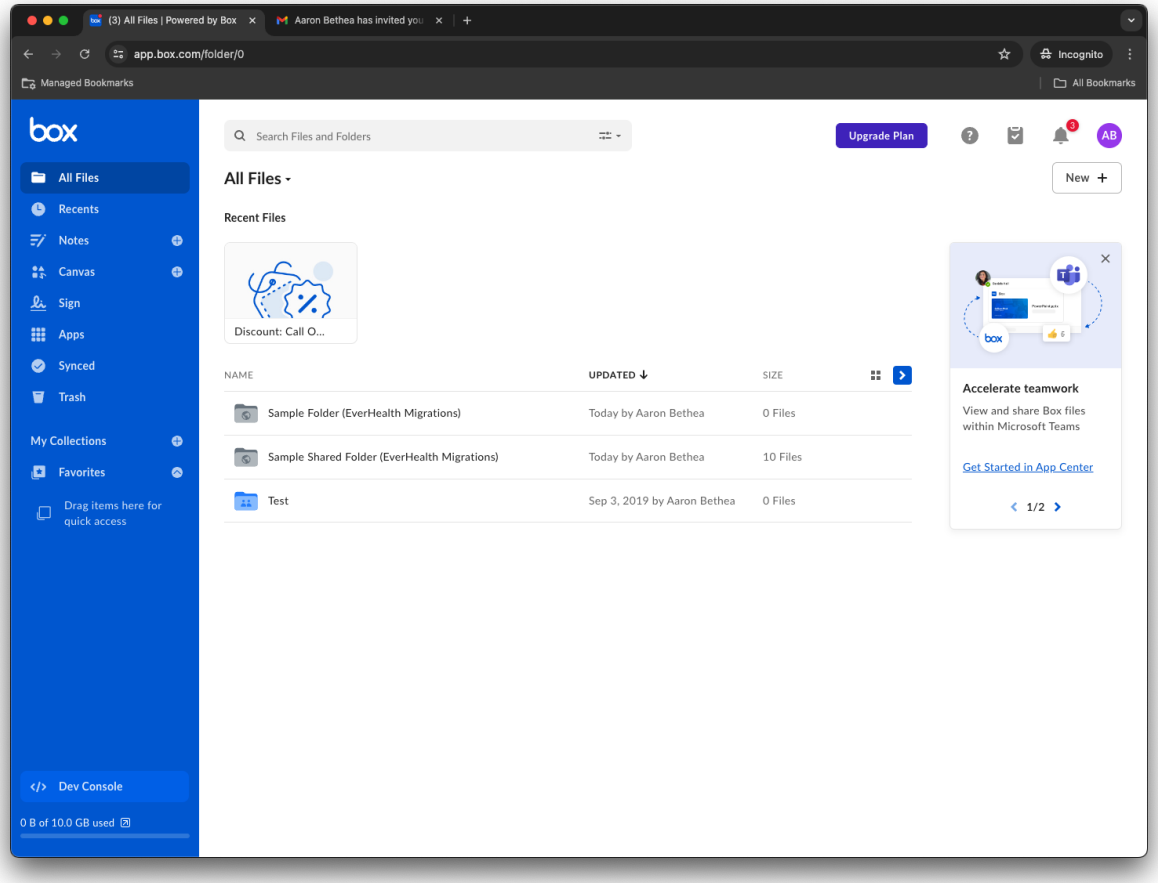
2. As a HIPAA requirement to access sensitive data: Two Factor Authentication (2FA) must be enabled within the customer's Box account (see Box.com's KB article: Enable Two Factor Authentication: Box). Note: if Two Factor Authentication is not enabled in the account, the customer will not be able to access the collaboration folder nor it's contents.
    a. Collaboration Folders requiring 2FA will appear atop the window in the "Action Items" drop down while in the "Files" section of Box.



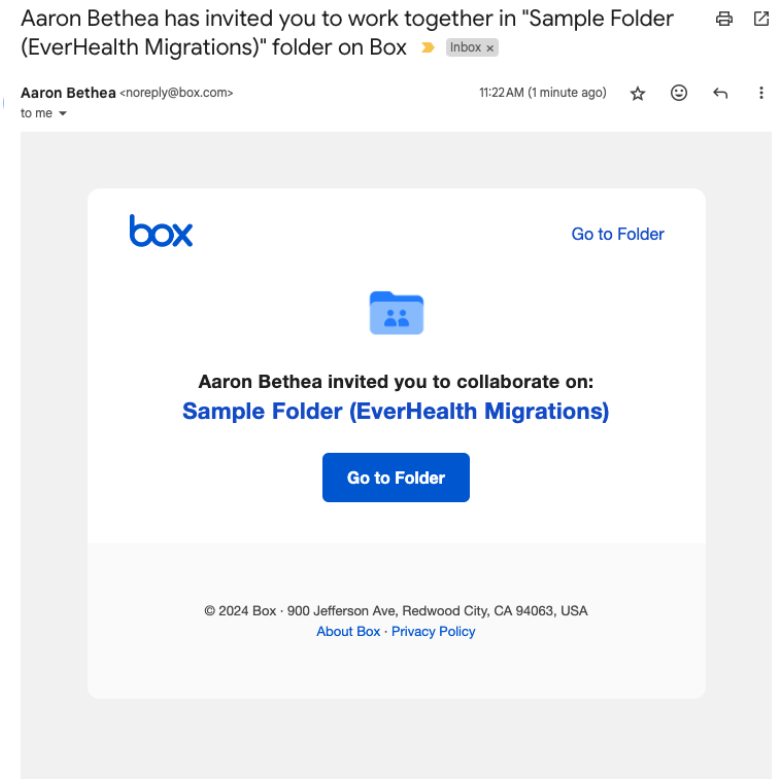

    b. Click "Set Up" to configure 2FA. Upon completion, the Collaboration Folder will appear in the "Files" area, denoted with a gray icon (also shown in the "Loading Data Into Shared Folder" section below.

Loading Data into Shared Folder

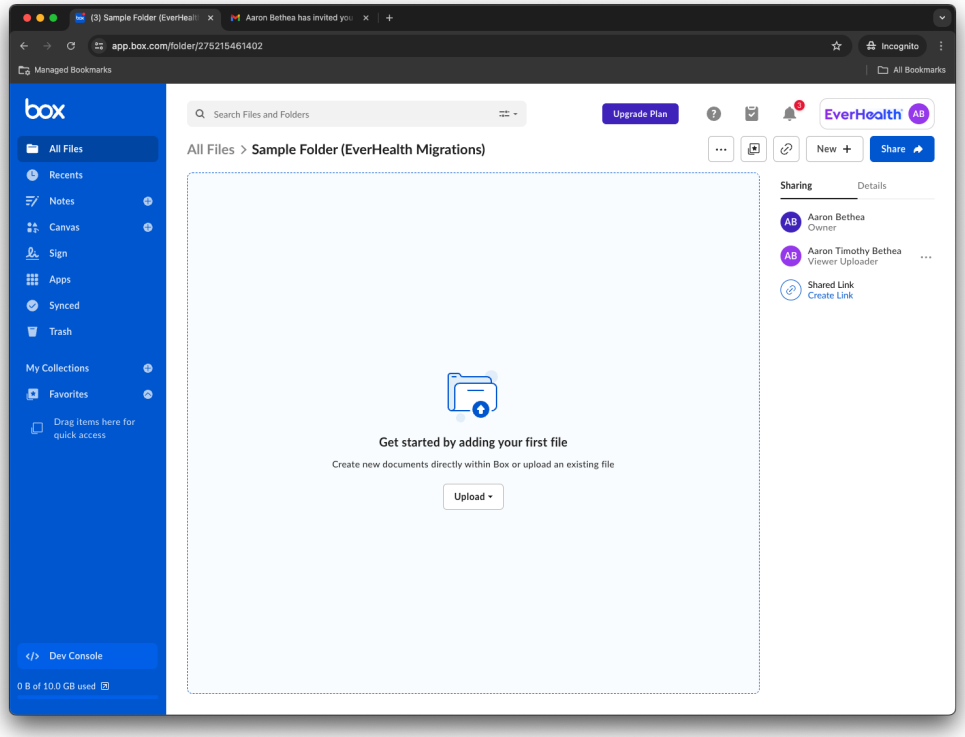
1. Once logged into your Box account, your dashboard "All Files" will show you the files and folders to which you have access. Folders shared with you for collaboration will have gray-colored icons.




2. To ensure you are loading data into the correct folder, make sure the folder name is the exact same as the one in your email invitation (for this case, our sample folder is "Sample Folder (Everhealth Migrations)" as shown below:

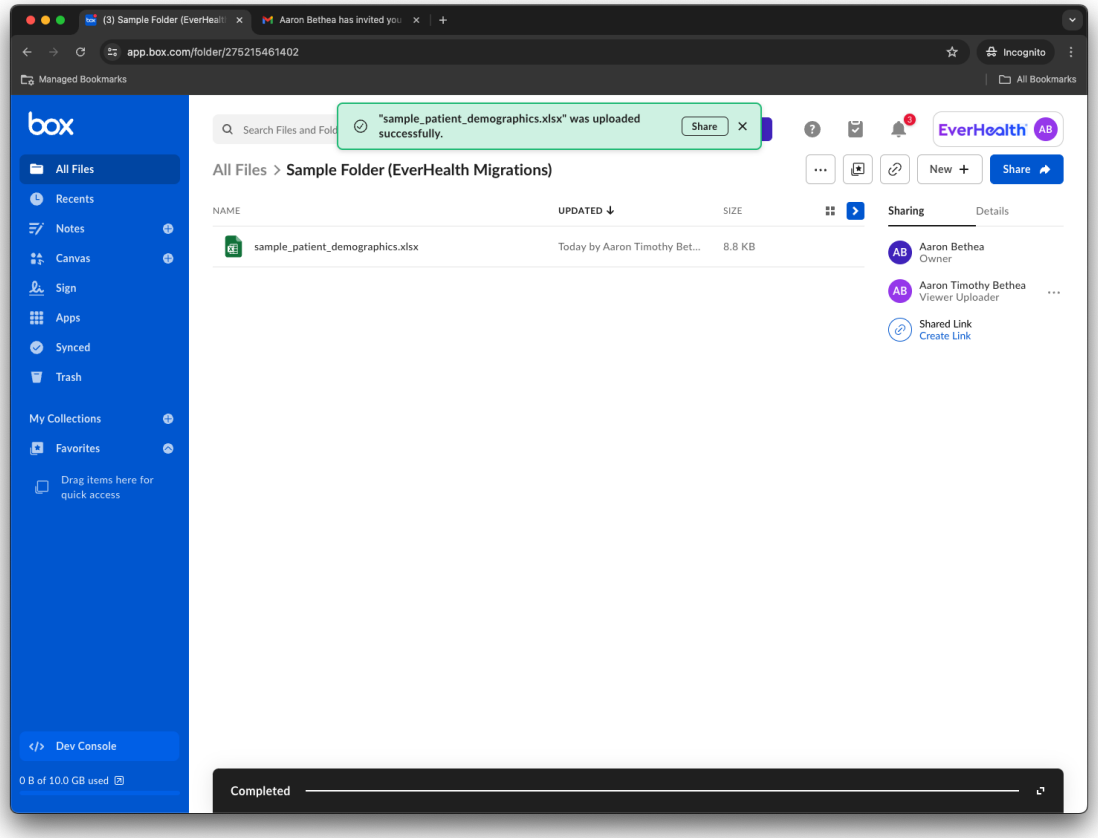


Then either click on "Go to Folder" from the invitation, or click on a folder matching the name from the "Files" section of Box to access the shared folder.




(Note: Make sure the heading atop the page reads the same name as the folder provisioned for you by DrChrono before uploading files)

3. Drag/drop files into the space in your folder, or click the "Upload" button to select a file(s) using your computer's File Explorer (Finder on Mac). Once files are loaded into this space, they are visible by the EverHealth Data Migration engineers and they can begin working on your data. Collaboration folders have an upload limit of 50GB per individual file, providing a great deal of bandwidth to load your files. If your files are larger than 50GB, or would like to transfer fewer files, you may want to consider compressing your data (Compressing files on Windows-based OS, Compressing Files on MacOS) into zip files prior to uploading into Box.




4. Once the files are uploaded, you may log out of Box and close the window.

That's all to it. In the event that additional guidance is needed, please reach out your EverHealth contact, or submit a support ticket.