

Citrix ShareFile Training Guide: External Client

Client Instructions for:
Navitus Health Solutions
Lumicera Health Services
EpiphanyRx

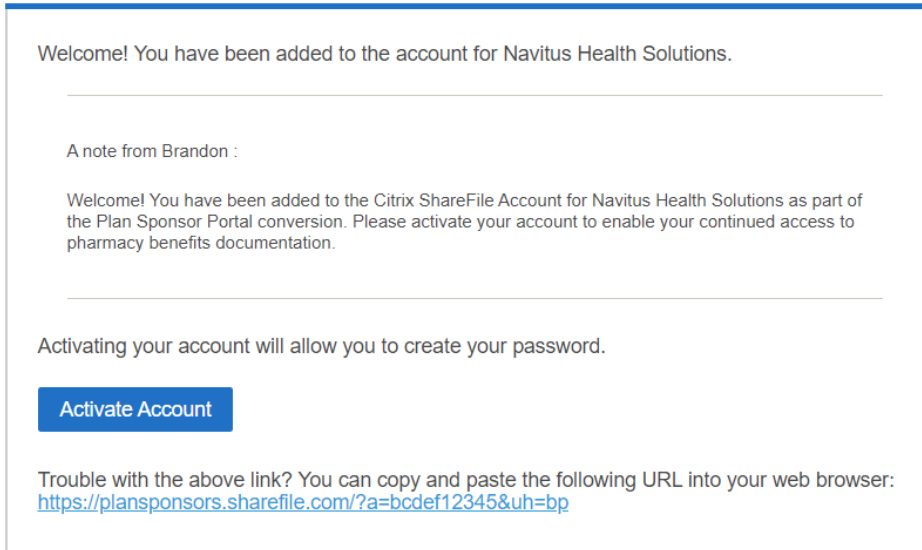
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Throughout this document the terms “External Client User” and “Client User” apply to clients of Navitus Health Solutions, Lumicera Health Services, and/or EpiphanyRx.

Initial Account Setup (External Clients Only)

External Client Users will receive a welcome email from Citrix ShareFile with an account activation link. If Client Users have not received this email, they should reach out to their Navitus, Lumicera, or EpiphanyRx implementation or account management team for assistance with the Client setup process.



Welcome! You have been added to the account for Navitus Health Solutions.

A note from Brandon :

Welcome! You have been added to the Citrix ShareFile Account for Navitus Health Solutions as part of the Plan Sponsor Portal conversion. Please activate your account to enable your continued access to pharmacy benefits documentation.

Activating your account will allow you to create your password.

[Activate Account](#)

Trouble with the above link? You can copy and paste the following URL into your web browser:
<https://plansponsors.sharefile.com/?a=bcdef12345&uh=bp>

ShareFile is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it's an easy way to send files that are too large to e-mail.

Powered By Citrix ShareFile 2022

Click the Activate Account button found in the Welcome email to active your account access. You will follow the on-screen steps and fill in the requested information, such as your first and last name, country, and phone number. Be certain to follow the password requirements to create a strong password. Screen shots are on the next page.

citrix | ShareFile.

1 2 3

Welcome! Please confirm your personal information.

First Name: * * Required

Brandon

Last Name: *

Smith

Company:

Google

Country: * Phone Number: * ?

United States +1 555-555-5555 ⋮

Text (SMS) Voice Call

Continue

Please create a password.

Passwords must meet the following requirements:

- ✗ at least 1 upper case letter
- ✗ at least 1 lower case letter
- ✗ at least 1 number
- ✗ at least 1 special characters
- ✗ at least 8 characters in length
- ✗ Passwords should match

We'll also perform an additional strength check on save. ?

Password: Show Password

⋮

Confirm Password:

⋮

Back Save and Sign In

Logging in as an External Client User

Once a ShareFile account is set up, logging in simply requires accessing the website from your computer. Beginning 9/23/2022, this link, <https://plansponsors.navitus.com/>, redirects clients to the ShareFile account.

Client User logs in by entering their email and password on the right side as in the picture below.

Left side for Navitus, Lumicera, EpiphanyRx login | Right side for Client User login

citrix | ShareFile.

Company Employee Sign In

ShareFile is a safe, secure method for sharing files. To access, use your Active Directory credentials.

Sign In

Sign In

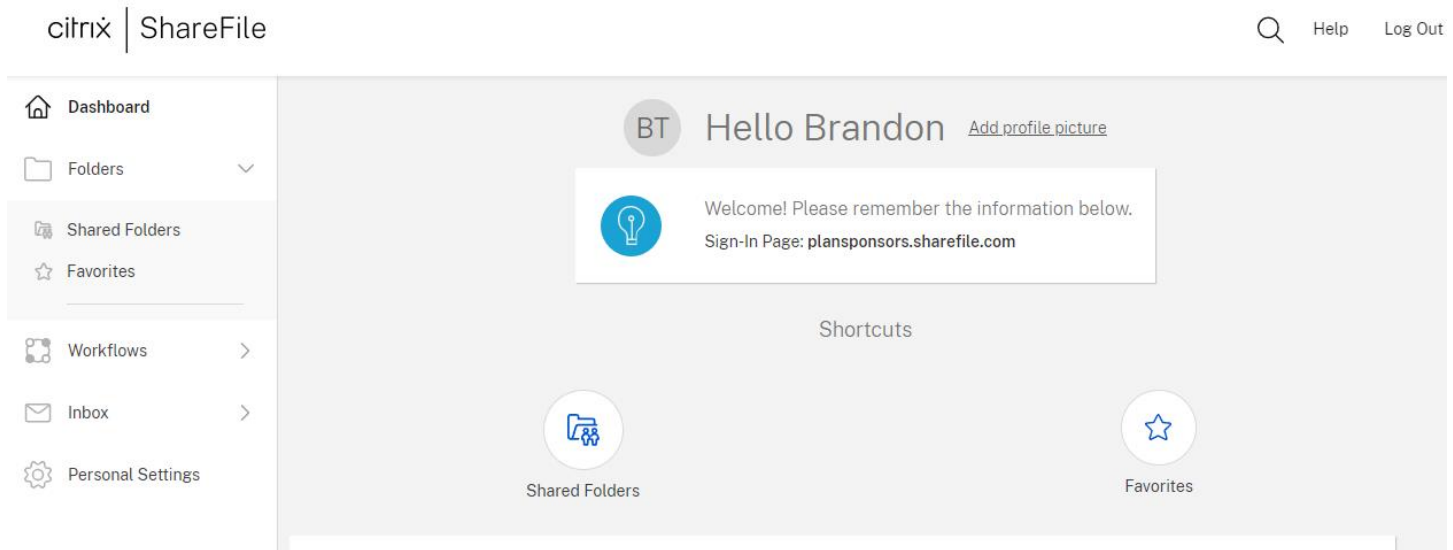
Email

Password

Sign In

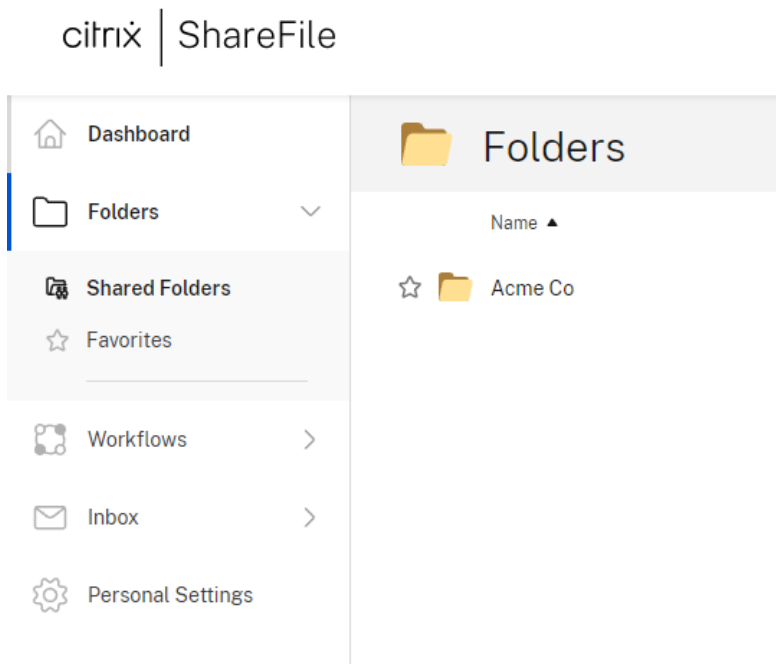
Remember Me [Forgot Password?](#)

Once logged in, your screen will look similar to the screenshot shown below.



Shared File Browsing

From your Dashboard, underneath the “Folders” icon, select the “Shared Folders” option.



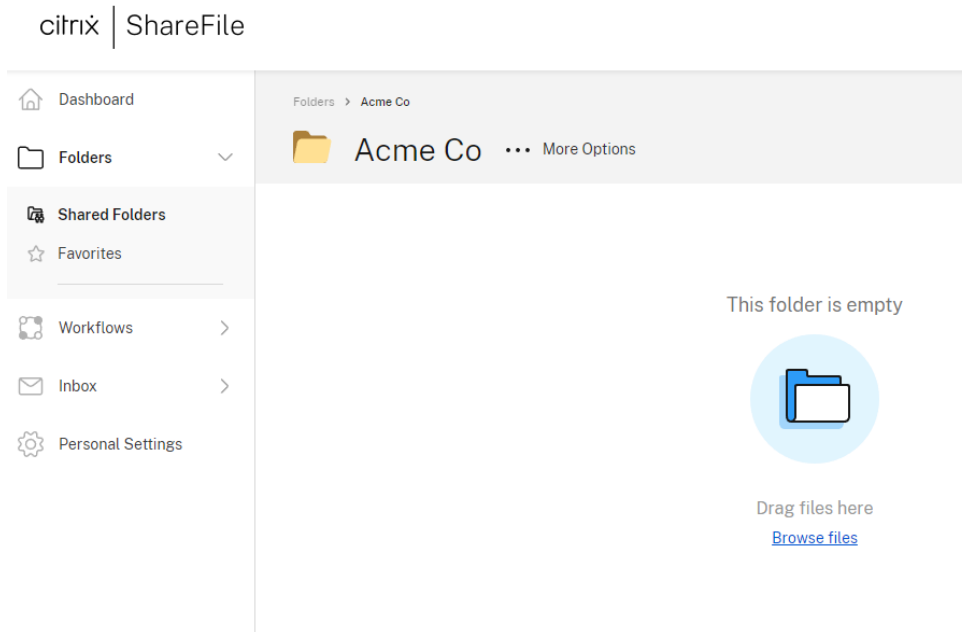
Click on the folder name to open a specific folder and view the documents in it.

Uploading a File

The folder in the example below does not yet contain files.

You will notice two options for uploading files.

- 1) Drag file here - Use this by dragging a file from another window into the open directory folder
- 2) Browse files – Use this by clicking the Browse files option, then maneuver to the file you want and upload it following the automated script.



Additional Support for Navitus ShareFile

If additional support, please reach out to your Navitus, Lumicera, or EpiphanyRx implementation or account management team for assistance.