Attachment H

NEW YORK STATE OF OPPORTUNITY | Office of Information Technology Services

Secure File Transfer 2.0
Quick Reference Guide

Secure File Transfer 2.0 (SFT) is a utility that provides solutions for the handling of sensitive information, including financial files, medical records, legal documents, personal data, etc. SFT securely collects, stores, manages, and distributes information between the NYS Health Commerce System (HCS) users. The utility will securely and easily transfer files and folders of up to 2GB in size between two or more users. It uses email addresses from the HCS Communications Directory to send and receive packages. Files remain on the HCS for **14 days**. This utility is similar to your email system. It has an Inbox, Drafts, Sent, Templates and Trash mailboxes.

How do I access Secure File Transfer 2.0?

1. Log on **HCS** (https://commerce.health.state.ny.us)
2. Click **Secure File Transfer 2.0** in My Applications. To add it:
    - Click **My Content** located in the upper right of the menu bar
    - Click **All Applications**
    - Click S in the alphabet
    - In the **Secure File Transfer Application** last column, click the green circle with the white plus sign image ( ) to add shortcut to My Applications

How do I <u>send someone else a file/package</u>?

1. Click **Packages**
2. Click **Send Packages**
3. Enter the person's last name, User ID or email address in the **To** (cc or bcc) text field
4. Click **Check Recipients**. This will return all HCS user fitting the criteria entered
5. Check the checkbox next to the desired name and click **OK** (you may have to scroll down if it is a large list)
6. Enter the **Subject**
7. Enter the body of the **Note**
8. Click **Launch the Upload Wizard** (if you are attaching a file)
9. Click **Add File**
10. Select the file(s) you want to send
11. Click **Upload**
12. Click **Close**
13. Check the checkbox if you want to get a delivery receipt and/or prevent 'reply all' (not required)
14. Click **Send**

NOTE: You can also use the **To** icon to search the **Address Book**. Be sure to click the magnifying glass image OR enter an asterisk (*) in the beginning and end of the search criteria (i.e., *smith*) for accurate results. **Please see page 2 for searching details.**

How do I <u>retrieve a file/package someone has sent me</u>?

You will receive an email from the Secure File Transfer utility. Click the link in your email to open your SFT Inbox to get to the package OR:

1. Click **Packages**
2. Click **View All Mailboxes**
3. Click **Inbox**
4. Click the Subject link

How do I <u>upload a file</u>?

1. Click **Folders**
2. Click on 'Go to Folder' drop down and select **/home/[userid]**
3. Under Upload Files section, click **Launch the Upload Wizard**
4. Click **Add File**
5. Select the file(s) you want to upload
6. Enter notes (if applicable)
7. Click **Upload**
8. Click **Close**

How do I <u>send an uploaded file</u>?

1. Click **Folders**
2. Click Go To Folder dropdown and select your folder (**/Home/*your name or userid*/**)
3. Check the checkbox next to the file you want to send
4. Click **Send**
5. Enter the person's last name, User ID or email address in the **To** (cc or bcc) text field
6. Click **Check Recipients** (this will return all HCS user fitting the criteria enter
7. Check the checkbox next to the desired name and click **OK** (you may have to scroll down if it is a large list)
8. Enter the **Subject**
9. Enter the body of the **Note**
10. Click **Send**

How do I <u>create an email template</u> for repeated use?

- Follow 'How do I send someone else a file/package?' steps 1-13
- Click **Save As Template**
- In the blue bar, you will have a message that says 'Saved package as template with ID # OK. Click '<u>Click here to return to packages</u>'.

NOTE: If you routinely send to the same person/people, using a template saves time and is ready when you are. Also, templates are not deleted after 14-days.

Support...

- User support—Click the **Quick Reference Guide** for quick 'how to' steps
- Technical support—send an email to hinweb@health.ny.gov

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Additional information...

How do I search using the Check Recipient?

Search for a user

1. Enter the recipients last name, email address or userID in the To field. If you are sending to more than one recipient, separate the information with a comma (,) between each user. Also, you can carbon copy (cc) and blind carbon copy (bcc) recipients by clicking on **Show Cc/Bcc** link below the To field.
2. Click **Check Recipient**
3. From the results, check the box next to the user you want to receive the package, click **OK** (you may have to scroll down)

   NOTE: If you entered more than one recipient, each result will happen one at a time, just repeat Step 3 above for each user. For example, if you are sending a package to three people and you enter Smith, Patel, Jones. The system will look for the people in the order they were entered. It will search for Smith first then you select from the results; then system will search for Patel next then you select from the results; and then for Jones last then you select from the results. It will populate the To field will each of their information (name and organization).

How do I search using the To icon or Address Book?

1. Click the **To** icon or **Address Book**
2. Enter the recipients last name, email address or userID in the search field, and click the magnifying glass image. If you did not get the expected results, enter an asterisk (*) in the beginning and end of the search criteria (i.e., *smith*) for accurate results.
3. Check the box next to the recipients name, and click **Send to...**

How do I recall a package?

Recall information

1. Click **Packages**
2. Click **Sent** mailbox
3. Click the subject link
4. Click **Recall**

   NOTE: This recalls a package that was sent even if it was already opened.

How do I add more mailboxes (under Packages)?

Mailbox information

1. Click **Packages**
2. Click **Add Box...**
3. Enter the mailbox name
4. Enter the description of the mailbox
5. Click **Add Box**
6. To return, click the top blue line that says 'Click here to return to the mailbox list'

NOTE: Keep in mind that the newly added mailbox is limited to 14-days.

How do I add additional folders to organize your uploads?

Folder information

1. Click **Folders**
2. Click on 'Go to Folder' drop down and select **/home/[userid]**
3. Click **Add Folder**
4. Enter the folder name
5. Click **Add Folder**
6. Click **Return to folder list**

How do I delete a folder I added?

1. Click **Folders**
2. Click 'Go to Folder' and select **/home/[userid]**
3. Click the X on the far right of the same Folder row that you want to delete

How do I verify my package was opened by recipients?

Package information

1. Click **Packages**
2. Click **Sent** mailbox
3. Click the subject link
4. Click **More** next to Read Status if multiple recipients
   - Green ball—means the recipient opened the package
   - White ball—means the recipient did not open the package

How do I look up my transactions?

Logs information

1. Click **Logs**
2. Enter criteria
3. Click **Apply Filters**

How do I customize my view of the results?

1. After you have your results
2. Click **Customize View**
3. Select criteria
4. Click **Update View**

PLEASE REMEMBER!!!

- Files remain on the HCS for **14 days**
- File size is limited to **2 gigabytes**