

# 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?

- Log on HCS (https://commerce.health.state.ny.us)
- 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 send someone else a file/package?

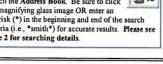
- Click Packages
- Click Send Packages
- Enter the person's last name, User ID or email address in the To (cc or bcc) text field
- Click Check Recipients. This will return all HCS user fitting the criteria entered
- Check the checkbox next to the desired name and click OK (you may have to scroll down if it is a large list)
- Enter the Subject
- Enter the body of the Note
- Click Launch the Upload Wizard (if you are attaching a
- Click Add File
- 10. Select the file(s) you want to send
- 11. Click Upload
- 12. Click Close
- 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 retrieve a file/package someone has sent me?

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:

- Click Packages
- Click View All Mailboxes
- Click Inbox
- Click the Subject link



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## How do I upload a file?

- Click on 'Go to Folder' drop down and select /home/[userid]
- Under Upload Files section, click Launch the Upload Wizard
- Select the file(s) you want to upload
- Enter notes (if applicable)
  - Click Unload
- Click Close

# How do I send an uploaded file?

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

# How do I create an email template 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 'Click here to return to packages'

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.

- 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?

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 (,)

Search for a user

Recall information

Mailbox information

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.

Click Check Recipient

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?

Click the To icon or Address Book

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.

Check the box next to the recipients name, and click Send to ...

## How do I recall a package?

- Click Packages
- Click Sent mailbox
- Click the subject link

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

# How do I add more mailboxes (under Packages)?

- Click Packages
- Click Add Box
- Enter the mailbox name
- Enter the description of the mailbox
- Click Add Box
- 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?

- Click on 'Go to Folder' drop down and select /home/[userid] Click Add Folder
- Enter the folder name
- Click Add Folder
- Click Return to folder list

## How do I delete a folder I added?

- Click Folders
- Click 'Go to Folder' and select /home/[userid]
- 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?

- Click Packages
- Click Sent mailbox
- Click the subject link
- 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?

- Click Logs
- Enter criteria
- Click Apply Filters

# How do I customize my view of the results?

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

## PLEASE REMEMBER!!!

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

Folder information

Package information

Logs information