

Montana File Transfer Service: <https://transfer.mt.gov/Home/Login>

General Description:

The State of Montana's File Transfer Service allows for easy transfer of large electronic files to and from customers of state government. It is designed to facilitate file exchange when files are too large for email. It also allows for secure transfer of sensitive data (attachments only). The File Transfer Service is one of the first to be secured by ePass Montana, the state's single login service. The transfer of files must include a state email address either on the sending or receiving end. State employees are able to send files to other state employees or ePass Montana customers. ePass Montana customers are only able to send files to state employees. **Please Note: State of Montana employees, do not create an ePass Montana account, login as directed below.**

To become a registered ePass customer you must create an ePass Montana account.

The service requires no software except for a web browser. All aspects of the transfer are securely encrypted, ensuring that customers meet all security requirements under state and federal information privacy regulations. Files are scanned for viruses during transfer. An automated reminder system notifies the recipient of files they have available for download, and the system tracks receipts for all transfers, showing detailed information about when a file is uploaded as well as when it is downloaded. Customers can upload files as large as 2GB. Files must be downloaded within fifteen days, after which the transfer expires and the files are automatically removed from the service.

Creating an Account

If you do not yet have an ePass Montana account, then you must create one. <https://app.mt.gov/epass-idp/Authn/EpasLogin/> - click Login, then click "Create an Account" **Please Note: State of Montana employees, do not create an ePass Montana account, login as directed below (Logging In).**

1. Enter the required personal, contact, and login information
2. Add File Transfer Service to your new ePass Montana account
 - o Enter the code that was emailed to you, and then click "Submit".
 - o Now you are able to login using your ePass Montana username and password.

Logging In

State Employees:

To log in, select the link that says "Login with State Employee Account", and then use your state network login credentials.

ePass Montana Customers:

Enter your ePass Montana username and password.

Inbox Management

After logging in, you will be able to view your sent and received files. Also, you will see the options to send files or view the received transfers. If you wish to sort the sent or received files by name, file, date, or status, then simply click (ascending) or double click (descending) the column label in the title bar. To delete files, you must check the box(es) to the left of the file(s) and then select the "Delete Selected File(s)" button at the top of the page.

File Transfer Status

Following are the status definitions for files transferred:

- **Processing File:** This will occur immediately after the file is uploaded. The file is migrated to the server and waiting for a virus scan.

- **Incomplete - Select Recipients:** The file has been moved onto the server, but it doesn't have a recipient available to download the file. To Add a recipient, select the file name and you will then be able to add recipients to the file.
- **In Transit:** The file is in the process of being moved to another server.
- **Scanning for Viruses:** The file is being scanned for viruses. If a virus is found, you will be notified through email and the file will be immediately removed from the server. It will not be available for download.
- **Complete:** The file has resided on the server for the maximum of 15 days and has been removed. The file can no longer be downloaded.
- **Ready for Download:** The file has been scanned for viruses and is ready for the recipients to download.

Sending Files

1. To send a file you must select the "Send a New File" button.
2. Drag and drop files into or click anywhere in the gray box on the page to select your files. If you would like to add more files, then simply drag and drop more or click in the gray area of the screen again.
3. To remove a file, click the "Remove File" button.
4. When satisfied with file selection(s), click the "Continue" button.
5. Select the recipient(s) of the files either:
 - State Employee or ePass Montana Customer.
 1. Add a state employee by using the lookup and clicking the button with their name on it to add them to the To box. Do not manually enter an email address in the To box.
 2. To remove a recipient, click the "x" to the right of their name in the To box.
 3. On the bottom right of the page, you can enter a message to send with the file(s). **NOTE: This message is sent in clear text to the recipient. It is not encrypted. Do not enter sensitive information into this message box.**
 4. When you are satisfied with your recipients and message, click the "Send" button.
 - W-2 forms to Department of Revenue.
 1. If you select W-2 forms, then it will send your file to the Department of Revenue.
 - 1099 forms to Department of Revenue.
 1. If you select 1099 forms, then it will send your file to the Department of Revenue.
6. A receipt containing the recipient(s) and the file(s) that you sent will appear. You can print the receipt, or go to the home page.

Receiving Files

1. To view the received file(s), select either the Received or the Sent tab, and click the name of the files to see the details of the transfer.
2. When the status says it is "Ready to Download", select the file that you wish to download.
3. To download, select the "Download File" button, and then open or save the file.

* PLEASE NOTE: Once a file's status is "**Completed**", you are no longer able to download or view that file.

MT Drive Use

Rules of Use:

1. Users must have an ACF2 ID in order to create shareable folders. Each ACF2 ID is allowed 20 GB of storage in the shareable folders. The user is the folder owner.

2. The folder owner can invite any other user (state or non-state employee) to the shared folder with either of the following permissions:
 - EDITOR – can upload files into the shared folder, can remove files from the shared folder, can download files on the shared folder.
 - VIEWER – can download files in the shared folder.
3. The folder owner can un-invite user(s) to the shared folder.
4. When a state employee leaves (ACF2 ID no longer exists), all permissions on the folder are removed and the files reside in the system for 30 days pending notification from a supervisor to retain the files. The files are then transferred to the supervisor. If no notification is received within 30 days, the files are deleted.

Setting Up Folders & Adding Files:

1. Files can only be uploaded inside of a folder. You can create an unlimited amount of folders.
2. To add a folder to your account you must select the "Add New Folder" button. Provide a name for your folder in the popup window and click the "Save Changes" button.
3. To add files to a folder, click on the folder's name. Once inside the folder, you can add files by selecting the "Add New File(s)" button.
 - Drag and drop files into or click anywhere in the gray box on the page to select your files. If you would like to add more files, then simply drag and drop more or click in the gray area of the screen again.
 - To remove a file, click the "Remove File" button.
 - When satisfied with file selection(s), click the "Continue" button.

Inviting Users:

1. After you click on the name of the folder you would like to add a user to, you can click on the Invite button on the left side of the screen to choose to invite Viewers or Editors.
2. You can add a state employee by using the lookup and clicking the button with their name on it to add them to the To box or you can simply type their email address directly inside the To box.
3. You can add an ePass Montana Customer by typing their full email address into the To box.
4. To remove a recipient, click the "x" to the right of their name in the To box.
5. On the bottom right of the page, you can enter a message to send with the invitation to the folder.
6. When you are satisfied with your invitees and message, click the "Send" button.

Downloading & Removing Files/Folders:

1. To download a file, check the box next to the file. Click the "Download Selected File(s)" button, and then open or save the file.
2. To delete a file or folder, check the box next to the file or folder. Click the "Remove Selected File(s)" or the "Remove Selected Folder(s)" button.
3. To work with multiple files, use the check boxes to select multiple files and then click on "Download Selected File(s)" or "Remove Selected File(s)"

* PLEASE NOTE: You must delete all the files inside of a folder first so that it is empty before you can delete a folder.