Montana
Office of Public Instruction
opi.mt.gov Elsie Arntzen, Superintendent

ePass Montana Account Setup and File Transfer Service

AIM User Guide

ePass Montana is a service provided on Montana's official state website that provides several benefits to Montana's businesses and citizens. It allows access to all authorized eGovernment services with one username and password. It also provides customization options for mt.gov so customers can personalize their services page. ePass Montana also grants authorized users access into federal government services

If you need assistance, click on the **How Do I** link, or the **Instructions** link located on each screen. If you would prefer to talk to an individual, please call 406-444-2000 and someone will be able to assist you. The Help Desk hours for this web site are 8:00 a.m. to 5:00 p.m., Monday through Friday.

You may also choose to click on the **Contact Us** link at the bottom of the page. This allows the user to provide feedback on the services and content of the mt.gov web pages.

EPASS MONTANA IS A SECURE SERVICE WHICH ALLOWS SCHOOLS AND DISTRICTS TO SEND THE OPI LARGE FILES THAT REGULAR EMAIL SERVERS CANNOT PROVIDE, AND ALLOWS FOR THE SAFE TRANSMISSION OF SENSITIVE PERSONAL IDENTIFIABLE INFORMATION (PII).

USERS MUST CREATE A UNIQUE ACCOUNT IN ORDER TO USE EPASS SERVICES. PLEASE DO NOT SHARE ACCOUNTS OR PASSWORDS.

Due to the State of Montana security policies and guidelines as well as the Family Educational Rights and Privacy Act (FERPA), the OPI needs to keep student data confidential. This service can be used by the OPI and school district staff to send student files back and forth in a secure manner.

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Setup an ePass Account

The first step in using ePass is to create a user account:
1. Open your web browser and go to [ePass Montana](#).
2. Click the **Login** button on the left.
3. Click the **Create an Account** button on right side of the next page.
4. Follow the instructions for entering all required information including a username and password.
5. After setting up your account, you will either be taken to your customizable portal page, or to the service you were logging into, depending where you began.
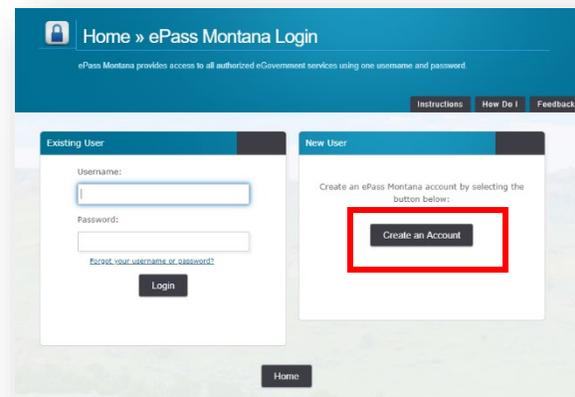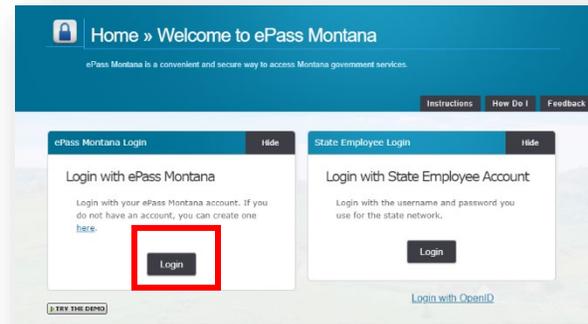
Secure File Transfer Service

The State of Montana's **File Transfer Service** allows for easy transfer of large computer files to and from customers of state government services. It is designed to facilitate file exchange when files are too large for email (over 4 Mb) and allows for secure transfer of sensitive data.

This service requires no software except for a web browser (Internet Explorer, Firefox, etc.). 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. *Files must be downloaded within fifteen days, after which the transfer expires and the files are automatically removed from the service.*

The **Secure File Transfer Service** will allow the OPI AIM staff to assist you with data cleanup of your student records in the AIM system. Due to the State of Montana security policies and guidelines as well as the Family Educational Rights and Privacy Act (FERPA), the OPI needs to keep student data confidential. This service can be used by the OPI and school district staff to send student files back and forth in a secure manner.

Once your account has been created, you will need to add the **File Transfer Service** to your new ePass account.

Note: The File Transfer Service is <u>not</u> automatically added to a user once the account is created. Since there are so many services offered, each user must manually add the desired services to their account.

To add the *File Transfer Service* to Your Services:
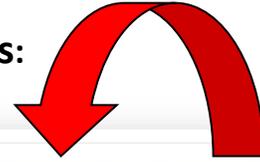
Services available to users will be listed alphabetically along the right side under the box labeled **Add a Service?** Click on the service to add it to the Your Services section to the left. Services listed on the left indicate the user has access to them.
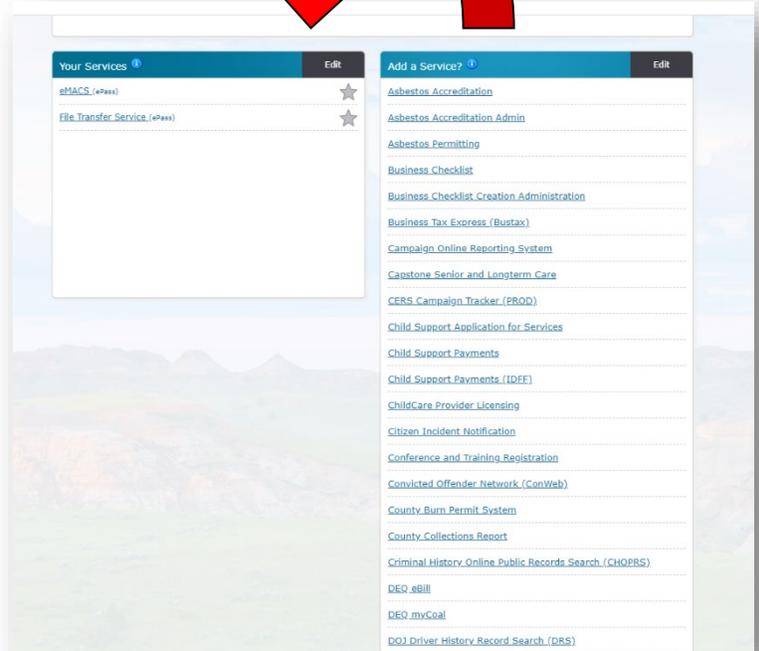
1. When you click on **File Transfer Service** to bring it to the left side under **Your Services**, an activation code will then be emailed to you.

2. Open your email Inbox. A message similar to the image to the right will appear in your email. *Click on the link provided in the email.*

3. You will be redirected to the ePass website and placed in the **File Transfer Service** menu.

Sending Files Through ePass File Transfer Service:

1. Login to your ePass MT account.
2. Once logged in, a screen similar to the one on the right will appear. Click on **File Transfer Service** *(it should appear on the left side if you have correctly added it to Your Services).*

3. Click on **Send a New File(s)**.

4. Browse to the file you would like to send and then click **Continue**. If you would like to add more files, browse again and click **Add to File List**. When you are satisfied with the file list, click on **Continue**.
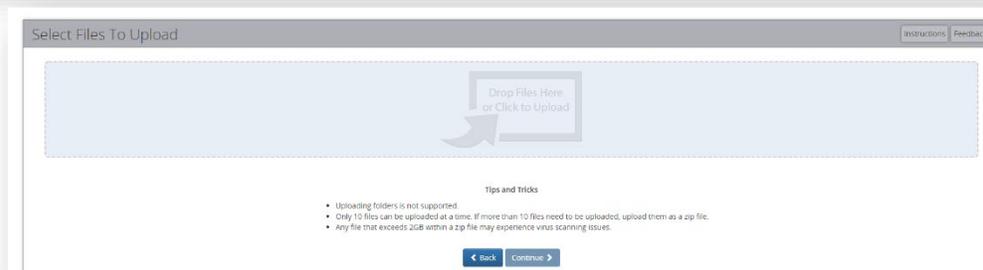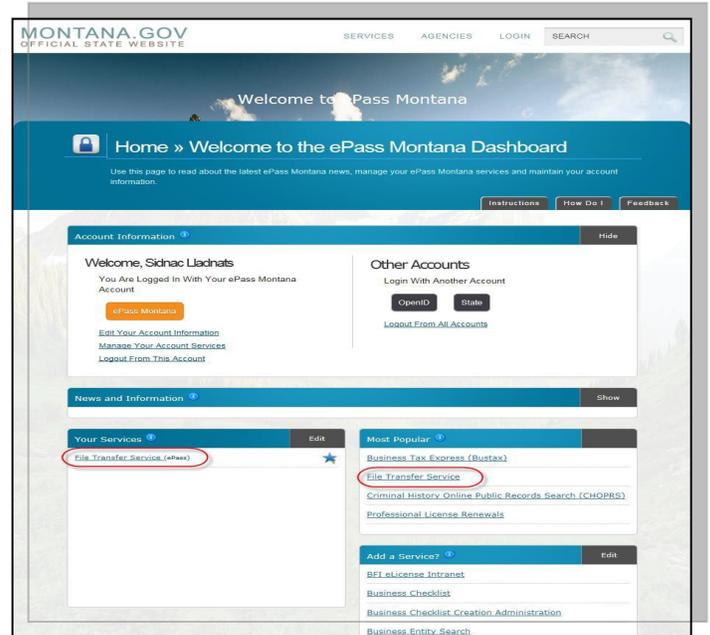
5. Select the category of recipients for the files you are sending. It is most likely that you will want to select either **State Employee** or **ePass Montana Customer** categories to receive your file.
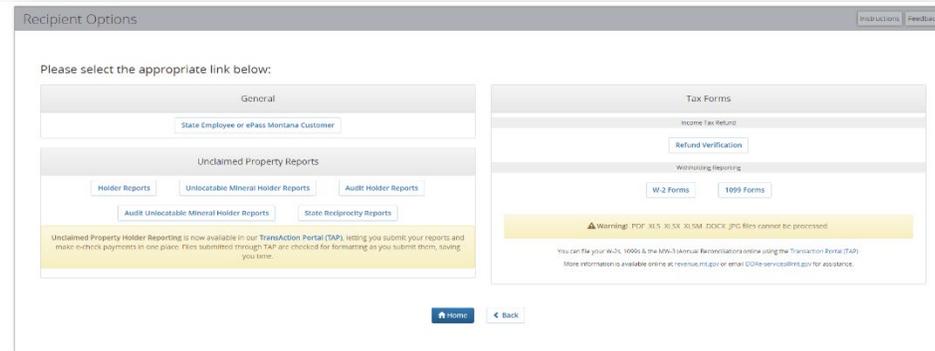
6. Enter the email address of the recipient of your file, or you can also try searching for their name in the ePass MT database under Find a State Employee. You may also include a message for the recipient on the right-hand side.
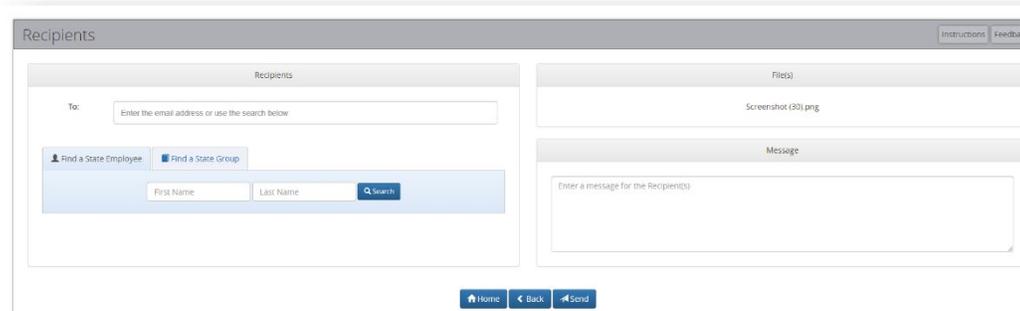
7. Click **Send**.

8. When your file has been sent, you will see a Sent Receipt. Click **continue**.

9. If you have finished sending your file(s), **logout** of ePass or return to **ePass Home** if you prefer to stay logged in or have other government services you wish to access.
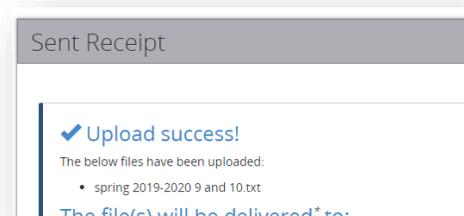
10. Receiving Files:

Note: *If you have not set up an ePass account, you will need to do so before you can receive files. Please refer to the section above:* Set Up an ePass Account

When you have been sent a secure file from an ePass Montana user, you will receive an email message similar to the image to the right.

1. Click on the blue file transfer service link in the email to be taken to the ePass login screen. (You may also go directly to the ePass Montana site and login with your ePass ID and password.)

2. Click on **Download File**.

3. A file should appear at the bottom of your screen that will require you to click on it to either view or save the file.

4. Be sure to **Logout** of ePass when you are finished downloading your file or return to **ePass Home** if you prefer to stay logged in or have other government services you wish to access.

FILE TRANSFER SERVICE

STATE OF MONTANA

The following file has been sent to you through the State of Montana File Transfer Service:

FILE NAME: Test Window Attendance March 3 export.txt

SENT TO: ▮▮▮▮▮▮▮

SENT FROM: ▮▮▮▮▮▮▮

MESSAGE: ▮▮▮▮▮▮▮▮▮▮▮▮▮

To download this file, click on the link below:

http://transfer.mt.gov/transfer/ReceivedFileReport?TransferID=665a8628-1992-4c29-b4e6-8037ee5e0596

Replies to this email are not monitored.

Received File Report

File Name: spring 2019-2020 9 and 10.txt
File Information
- File Uploaded On: 4/13/2020 12:19:01 PM
- File Status: Ready for Download
- File Size: 5.1 KB bytes
- Number of days since file was uploaded: 0 days
- Number of days ▮▮▮▮▮▮▮
- File was sent by: ▮▮▮▮▮▮▮
System Message(s)
- Date of Message: 4/13/2020 12:18:39 PM - Message: You have a new file available in your File Transfer Service Inbox.
Recipient Download(s)

For more information, contact the AIM Help Desk at 1- 877-424-6681 or Submit an AIM Help Desk Ticket