ePass Montana Account Setup & File Transfer Service



ePass Montana Account Setup and File Transfer Service

AIM User Guide

<u>ePass Montana</u> 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 <u>DO NOT</u> 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.

	ePass Montana ID Details ⁽¹⁾ 2
"First Name:	*Username: (minimum 6 characters)
"Last Name:	*Password: (minimum 8 characters; must use letters and
Daytime Phone:	minoeraj
	*Verify Password:
*Primary Email:	
*Verify Primary Email:	"Password Hint:
Alternate Email:	
Security Info 🕕 🔒	a second s
For your protection, these questions will help us verify	
questions	
questions.	
van neems in die neuer, nad mas seed 3 anderen *1. Security Question: Choose one	
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Home » ePass Montana Login



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.



			https://transfer.mt.gov/		
	E TRANSFER SERVICE				
ent Transfers					
Z Sent Files Enceived Files	AT Drive Over Preferences				
Remove Selected File(s)	end a New File(s)				
Select All	Name 🕈	Size ‡	Sent ¢	Recipients \$	
			<< < 1 > >>		_
					_

FILE TRANSFER SERVICE

STATE OF MONTANA

You must validate your account in order to use the State of Montana File Transfer Service. Click on the link below

https://transfer.mt.gov/Home/Validate?validationToken=f3f61042-afc7-40a4-99e1-22fb2ece63df

Sending Files Through ePass File Transfer Service:

Note: If you have not set up an ePass account, you will need to do so before proceeding. Please refer to the section above: <u>Set Up an ePass Account</u>.

- **1.** Login to your <u>ePass MT</u> account.
- 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).
- 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.



A Sent Files Received Fi	les 🖄 MT Drive 🗘 User Preferences				
Remove Selected File(s)	+ Send a New File(s)				
Select All	Name 🕈	Size 🕈	Sent 🕈	Recipients 🗢	Status 🗢
			<< < 1 > >>		
Select File	es To Upload				Instructions Feedback
	r				
Second Second					
			Tips and Tricks		
		 Oploading folders is not Only 10 files can be uplo Any file that exceeds 2GB 	supported. aded at a time. If more than 10 files need 3 within a zip file may experience virus sca	to be uploaded, upload them as a zip file. anning issues.	
			A Back Continue N		
			CONTRACTOR CONTRACTOR		

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.

Please select the appropriate link below:	
General	Tax Forms
State Employee or ePass Montana Customer	Income Tax Refund
	Refund Verification
Unclaimed Property Reports	Withholding Reporting
Holder Reports Unlocatable Mineral Holder Reports Audit Holder Reports	W-2 Forms 1099 Forms
Audit Unlocatable Mineral Holder Reports State Reciprocity Reports	
Unclaimed Property Holder Reporting is now available in our TransAction Portal (TAP), letting you submit your reports and	Warning PDF XLS XLSX XLSM DOCX JPG tiles cannot be processed
make e-check payments in one place. Files submitted through TAP are checked for formatting as you submit them, saving you time.	You can file your W-3s, 1009s & the MW-3 (Annual Recontiliation) online using the Transation Portal (TAP) More information is available online at revenue mitator or email DORe services/limit.gov for assistance.

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.

	Recipients	File(s)	
To: Enter the email address or use the se	arch below	Screenshot (30) png	
Find a State Employee		Message	
First Name	Läst Name Q Search	Enter a message for the Recipient(s)	
	•	me Kack -⊀Send	

- 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.

Sent Receipt	
✓ Upload success!	
The below files have been uploaded:	
 spring 2019-2020 9 and 10.txt 	
The file(s) will be delivered [*] to:	

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: <u>Set Up an ePass Account</u>

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.

- 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 <u>ePass Montana</u> 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.
- 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.



Date of Message: 4/13/2020 12:18:39 PM - Message: You have a new file available in your File Transfer Service Inbox

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

Number of days
File was sent by:
System Message(s)

Recipient Download(s)