

Secure File Delivery Service User Guide

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1 *Overview*

1.1 Purpose of this Document

This document has been written to support SFDS users.

After reading this document, users will be able to use SFDS to:

- Submit and/or receive files securely to/from the Ministry; and
- Exchange files securely with other restricted groups of users (computer-to-computer transfers).

1.2 Related Documents

This document is related to the SFDS Administration Guide.

1.3 How to Use this Guide

1.3.1 Document Conventions

The following document conventions are used in this guide.

Bold	Indicates a push-button label.
<i>Italics</i>	Indicates a screen name.
<u>Bold underlined</u>	Indicates a hyperlink that appears on a screen



Note:

Notes provide additional information or emphasize a particular procedure.



Warning:

Indicates a warning or alert. To avoid making an error, you need to pay particular attention to the information contained in these alerts.



Tip:

Indicates a useful tip or shortcut that you can use to save time and keystrokes.

1.4 What is SFDS?

Secure File Delivery Service (SFDS) is a web based secure file transfer e-service that users can use to:

- Submit and/or receive files to/from the Ministry; and
- Exchange files within restricted groups of external clients (computer-to-computer transfers).

1.5 Description of Roles

1.5.1 *Ministry Business Areas*

Ministry business areas submit online SFDS access requests to DAS on behalf of clients that wish to exchange data in a secure manner with the Ministry or with each other. For example:

- The BC Children's Hospital wishes to exchange Chronic Disease Management files with the Ministry; or
- A group of BC physicians wishes to exchange files with the Ministry.

Ministry business areas are responsible for:

- Completing a request form for a new SFDS Use and submitting the request to DAS connections analyst
- In conjunction with a DAS connections analyst, confirming business requirements.

1.5.2 *Data Access Services*

Data Access Services supports the Secure File Delivery System (SFDS).

They are responsible for the following business activities:

- Ensuring appropriate agreements are in place with users.
- Reviewing MoH business area request details.
- Setting up and testing user access and Uses.

1.5.3 *Access Administrators*

Access Administrators provide a focal point for SFDS users within their organization. They are the first point of contact for SFDS users within an organization, and contact the Ministry Help Desk on behalf of their users. Requests or calls to the MoH Help Desk from any other source will be referred back to the Access Administrator for verification.

Access Administrators are also the primary contact point for the Ministry, when communicating with users within an organization.

Their responsibilities include:

- User Administration:
 - registering users within their health authority; and

- assigning and canceling access permissions.
- Digital Certificate Administration:
 - coordinating installing private keys and digital certificates on the appropriate computers;
 - removal of digital certificates; and
 - conveying the importance of protecting private keys to all users within their health authority.

1.5.4 Users

External clients use SFDS services to transfer files securely, and are responsible for participating in the completion of necessary agreements, defining their internal work flows, testing and implementing the service within their organizations.

1.6 Security

1.6.1 Agreements

The Ministry of Health requires external users of Ministry data to have a signed access agreement with the Ministry. This agreement defines conditions of access, security and privacy protection rules that external parties must adhere to when accessing Ministry data.

Clients must also ensure that their users are covered by confidentiality undertakings.

All agreements are retained within HAS and are logged and tracked in the HAS Connections database.

1.6.2 Two Factor Authentication

Like all Ministry secure web-based applications, SFDS uses two-factor authentication for allowing authorized users access to the service. These two factors are:

- 1. Organizational level Digital Certificates; and
- 2. LDAP User ID and Password.

These are set up by HAS and supported by the Ministry Help Desk.

1.7 Getting Support

If you require assistance with the SFDS application, contact your organizational Access Administrator. If you do not have an Access Administrator or you are an Access Administrator seeking support on behalf of a user in your organization:

- Call the MOH Help Desk (250-952-1234); or
- Send an email directly to HLTH.HnetConnection@gov.bc.ca.

Please have the following information ready to provide the help desk, or include these details in your email:

- Inform them you are using the SFDS application;
- Define the problem, including the specifics of any error messages displayed; and
- Ask that your call be assigned to Data Access Services (DAS) Connections Analyst.

By completing these steps you will ensure that the information required is captured and that your problem is assigned to the appropriate group for resolution.

2 *How Do I Access SFDS?*

2.1 Requesting Access to SFDS

Go to <http://admin.moh.hnet.bc.ca/forms/eforms/headquarters/7101.html> to request access to SFDS using the online application form. You'll need to have the following information ready:

- User name
- Organization ID
- Phone number
- Name of SFDS mailbox
- Name of the person at MoH to whom you are sending files.

The request will be sent to Hlth.hnetconnection@gov.bc.ca for processing.

2.2 Prerequisites for Access to SFDS

In order to access SFDS you need a healthnetBC Web Business Services digital certificate, and user ID / password that will be provided by DAS. If your organization has an Access Administrator, they will assist you with setting up your access.

You also need to have Internet Explorer v6.0 installed on your local PC.

You'll need to install the digital certificate, and once you have successfully logged in with your new user ID, change the generic password you were assigned to one of your own choosing, using the instructions below.



Note:

Once you are in SFDS, you will see only the services you have permission to use.

2.3 Digital Certificates

2.3.1 Roles

If you are accessing SFDS from a health authority, it is your Access Administrator's responsibility to coordinate the installation of your digital certificate.

For all other health employers, it is the responsibility of the person receiving the digital certificate to install on the local PC which will be transmitting the data, and for storing the certificate in a secure place.

DAS generates the digital certificate (and creates a password), records the information in their database and then emails the certificate to the authorized Access Administrator.

2.3.2 Installing a Digital Certificate

Use the following instructions to install the digital certificate into Internet Explorer v6.0 on your local PC.

1. Open your **Internet Explorer** browser.
2. From the **Tools** menu from the top function bar, choose **Internet Options**.
3. Select the **Content** tab and click the **Certificates** button. The list box displays certificates that have been imported.
4. Click the **Import...** button. The **Certificate Manager Import Wizard** is displayed.
5. On the first window, click **Next**. The wizard displays the **Select File to Import** screen.
6. Make sure that you have copied the digital certificate from your email attachment to your PC or LAN drive.
7. Select the file location with the **Browse** button.
8. In the **Files of Type** field, leave as "Personal Information Exchange .pfx"
9. Scroll through and locate the correct certificate file for healthnetBC.
10. Click the **Open** button. The wizard returns to the **Select File to Import** screen. The certificate file name from the diskette displays in the text box.
11. Click **Next**. The wizard displays the **Password Protection for Private Keys** screen.

12. Enter the password that was provided to the Access Administrator by the Help Desk. The Access Administrator must phone the Help Desk to obtain this information.
13. Select the **Enable strong private key protection** check box.



Warning:

DO NOT select Mark The Private Key As Exportable.

14. Click **Next**.
15. The wizard displays the **Select Certificate Store** screen. Check to be sure the radio button next to **Automatically select the certificate store based on the type of certificate** is selected.
16. Click Next. The wizard displays the **Completing the Certificate Manager Import Wizard** screen.
17. Click Finish. The import program opens to the **Private Key Container** window.
18. Click the **Set Security Level...** button and set the security level to Low. If Low is unavailable, select Medium.
19. Click on **Next**. You are notified that you have selected **Low**. Click on **Finish**.
20. The import program returns to the **Private Key Container** screen. Click **OK**.
21. The import is successful. Click **OK**.
22. You are now returned to the **Certificates** window in your browser. Your certificate should be displayed in the list box. Click **Close** and **OK** to return to your browser.

2.3.3 Deleting a Digital Certificate

1. Open your **Internet Explorer** browser.
2. From the **Tools** menu from the top function bar, choose **Internet Options**.
3. Select the **Content** tab and click the **Certificates** button. The list box displays certificates that have been imported.
4. On the **Personal** tab, select the certificate to be deleted. Click **Remove**.
5. On the **Certificate Manager** dialog box, click **Yes**.
6. Click **Close** to return to your browser.

2.4 First Time Access

The URL for the SFDS web site is <https://healthregistry.moh.hnet.bc.ca/>

2.4.1 Setting the Default Digital Certificate

The first time you access the site, you will be prompted to select a digital certificate to use when connecting. Select the certificate that was provided by DAS that has been installed on your local PC and click **OK**.

When presented with the Security Alert screen, click on **Yes**.

At the login screen, type in your user ID and password and click on **Login**.



Tip:

The first time you access SFDS, add it as a bookmark to your list of Favourite sites for easy access the next time that you log in.

The following screen will be displayed.

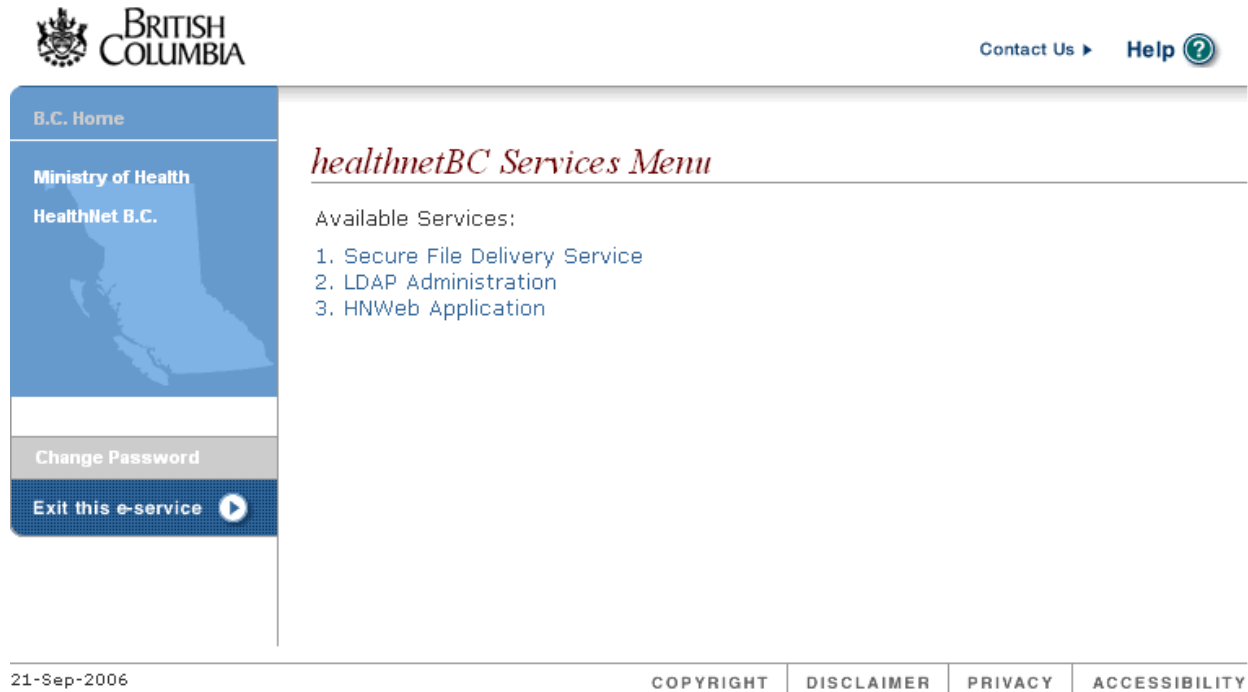


Figure 1 - healthNetBC Services Menu

2.4.2 Initial Password Change

The first time you access the site, and every 42 days thereafter, you will be prompted to change your password.

Click the Change Password link on the left side bar.

The following rules apply to passwords:

- Passwords must be six (6) or more characters long;
- Passwords must contain at least one number, and at least one alpha character;
- Passwords must not be obviously related to the user's name or User ID;
- Passwords must never be shared with other users. If your password becomes known by another individual, it should be changed immediately; and
- Passwords cannot be reused.

2.4.3 *Using the Change Password Screen*

1. Type your current password in the *Old Password* text box.
2. Type your new password in the *New Password* text box.
3. Re-type your new password in the *Confirm New Password* text box.
4. Click the **Start Over** button if you have made an error and wish to retype the information.
5. Click the **Change Password** button to change your password.

If successful, a success message will be displayed

If unsuccessful, a message will be displayed describing the error(s). Follow the prompts to correct the error(s) until the password change success message is returned.

3 Navigation

You access SFDS from healthnetBC Secure Web Services, the Ministry's secure web site that allows client access to various Ministry applications.

3.1 Log In

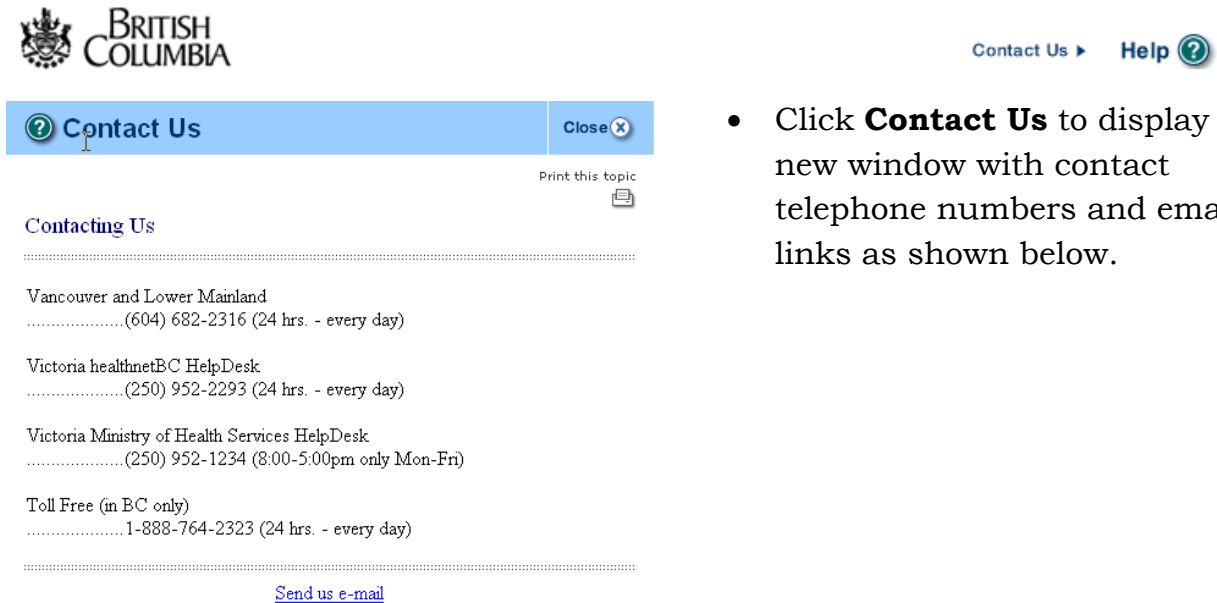
Log in to healthnetBC Secure Web Services at <https://healthregistry.moh.hnet.bc.ca/>, enter your user ID and password, and click **Login** to enter. The *healthNetBC Services Menu* will be displayed. The number of Available Services listed will depend the access privileges you have been granted.

The screenshot shows the healthNetBC Services Menu. At the top left is the British Columbia logo. At the top right are links for "Contact Us" and "Help". The main content area is titled "healthnetBC Services Menu" and lists "Available Services:" with three items: "1. Secure File Delivery Service", "2. LDAP Administration", and "3. HNWeb Application". On the left side, there is a navigation menu with "B.C. Home", "Ministry of Health", "HealthNet B.C.", "Change Password", and "Exit this e-service". At the bottom, there is a footer with the date "21-Sep-2006" and links for "COPYRIGHT", "DISCLAIMER", "PRIVACY", and "ACCESSIBILITY".

Figure 2 - healthNetBC Services Menu

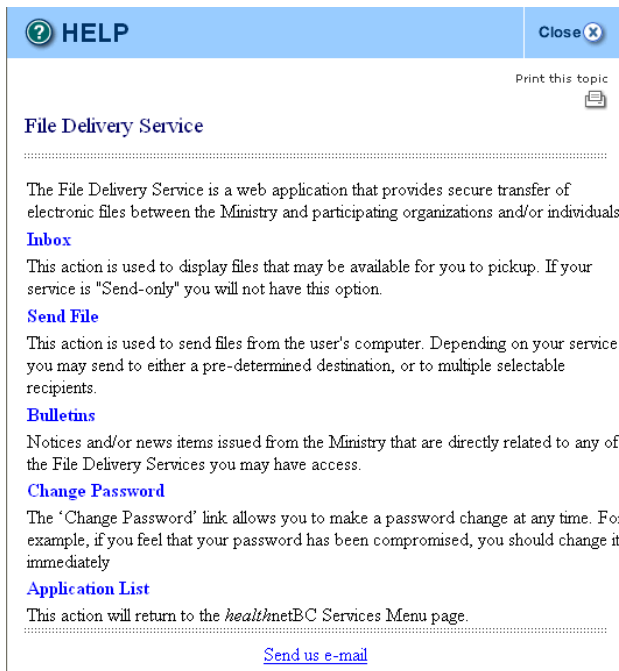
3.2 Common Navigation Tools

3.2.1 Header Links



- Click **Contact Us** to display a new window with contact telephone numbers and email links as shown below.

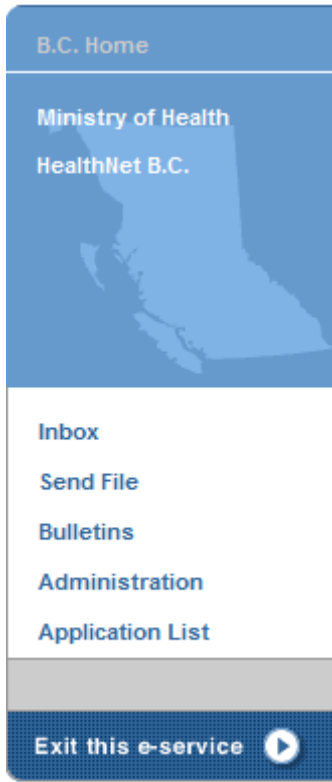
Figure 3 – healthNetBC Contact Us Window



- Click **Help** to display a new window with online help information.

Figure 4 – healthNetBC Help Window

3.2.2 Left Sidebar Links



The left sidebar is split into two main areas. The top area, with the blue background, contains a number of standard links:

- **B.C. Home** – will direct you to the BC Government home page;
- **Ministry of Health**– will direct you to the Ministry’s public home page; and
- **healthnetBC** – will direct you to the healthnetBC home page.

The bottom area, with a white background, allows you to move around within the service you click on the Application List.

Figure 5 – Left Sidebar

3.3 Accessing SFDS

At the *Available Services* screen, click the **Secure File Delivery Service** link to display the *SFDS Inbox* screen shown below.

British Columbia logo and navigation links: Contact Us, Help

B.C. Home

Ministry of Health
HealthNet B.C.

Secure File Delivery Service

Logged in as Jodi L. Harding

Inbox Select Account: odtd07

One Time Data Transfer 07

Delete	File Name	From	Date	Size Status
<input type="checkbox"/>	TestOfSend.txt	has test directory - odtd07	20-Dec-2005	1K New
<input type="checkbox"/>	testofsend.txt	has test directory - odtd07	20-Dec-2005	1K Received

Delete

Exit this e-service

Figure 6 - SFDS Inbox Screen

3.4 Menu Map

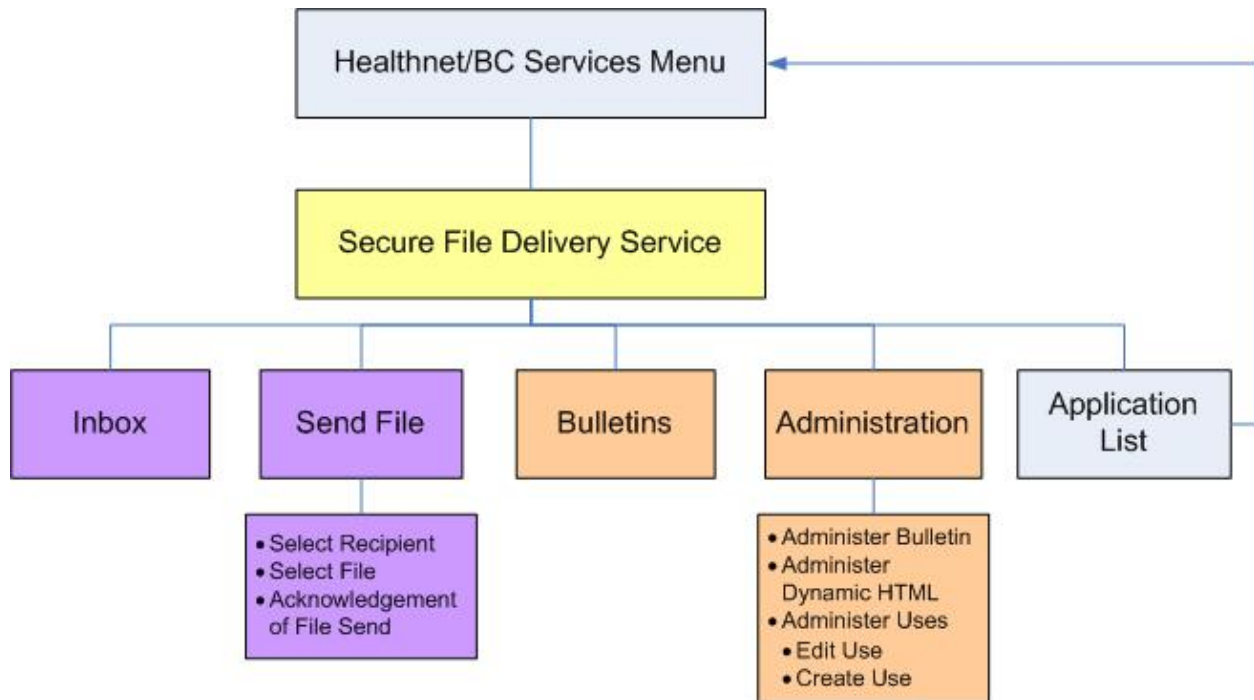



Figure 7 – Menu Map

The functions shown in purple are documented in this SFDS User Guide. The other functions are documented in the SFDS Administration Guide.

3.5 Online Help

Some screens display this symbol  that is a link to context sensitive on line Help.

As well, general help information is available by clicking the **Help** button in any screen header.

3.5.1 Data Field Labels

In most screens, if you float your cursor over a data field name, a pop-up will appear with a short description of the data field.

3.6 Signing Off

To exit the SFDS application, click the **Exit this e-service** link on the navigation menu

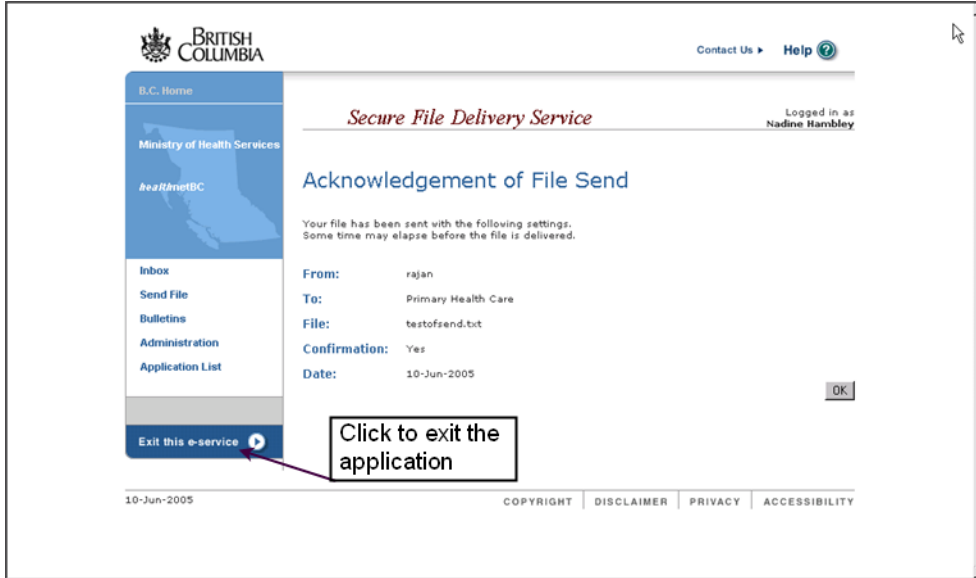


Figure 8 – Exit Link

4 *User Functions*

The SFDS user functions described in this section are:

- Inbox – users can pick up files using this function.
- Send file – users can send files using this function.
- Bulletins – users can download bulletins from the Ministry of Health using this function.

4.1 **Inbox**

4.1.1 *What is an Inbox?*

Users pick up files from SFDS by accessing their ‘inbox’. An ‘inbox’ points to a directory on the Ministry FTP server. When a user applies for an SFDS service, they are assigned an inbox. This inbox is then used to hold any files relating to that client. The user’s inbox can have any number of SFDS “Uses” associated with it.



Each type of transfer (submit, receive, computer to computer) is called a ‘Use’. A user can have multiple SFDS ‘Uses’, and can easily navigate between Uses, without the need to log off and log back in again

4.1.2 Receive File

Use this screen to receive files sent to you or to delete files you've already picked up.

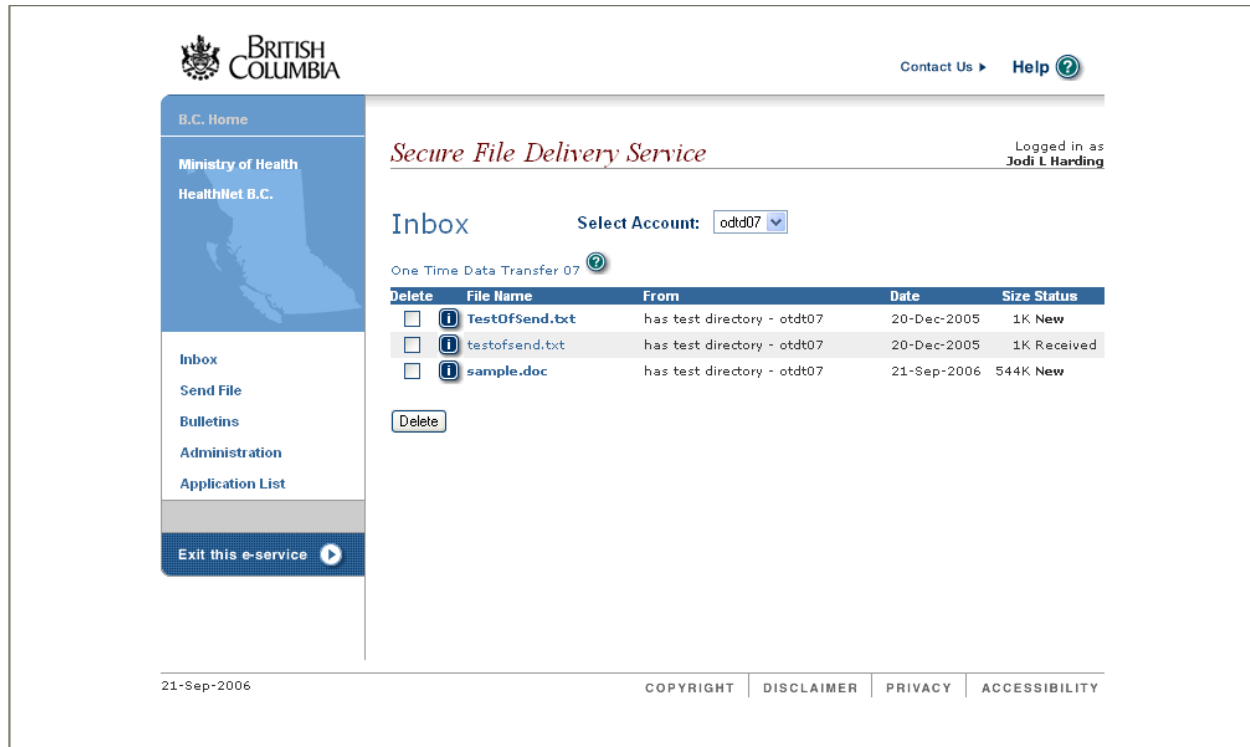


Figure 9 – SFDS Inbox Screen

The **Select Account** dropdown contains the Uses you have access to.



Click the button just above the dark blue header row to display help for this page

File Properties

You may wish to view the file properties of a file before making the decision to save or delete it.

Click the symbol to display file properties in a new popup window.



Figure 10 – File Properties Window

Click the Close button to close the popup window and return to the Inbox.

Save a File

File names are hyperlinks.

Click on one and the following standard Windows file download dialog is displayed.

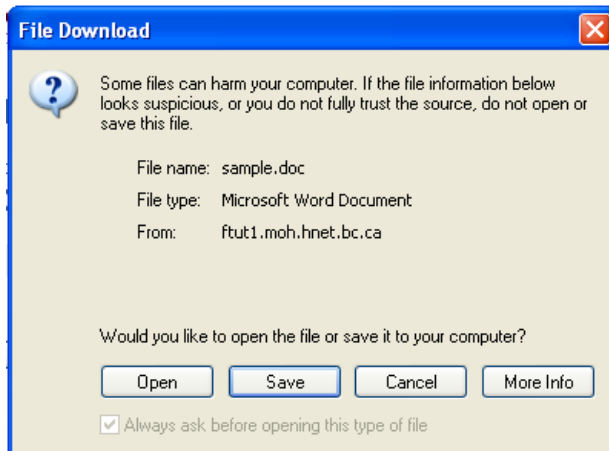


Figure 11 – File Download Window

Open or save the file to your local computer.

4.1.3 Delete a File

- To delete a file or files, click to tick box(s) next to file(s) you wish to delete on the *Inbox* screen, and click the **Delete** button.
- The following standard Windows file delete dialog is displayed.

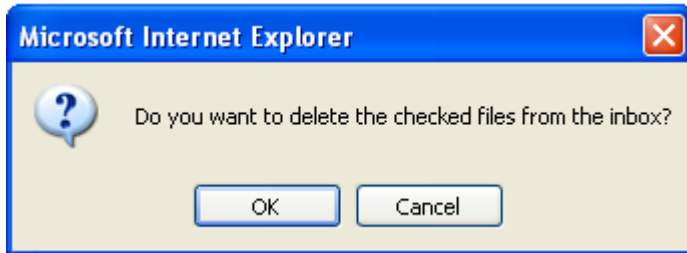


Figure 12 – Delete Query Window

Click **OK** to delete.

There will be no acknowledgement message, the list will just refresh without the deleted file.

4.2 Send File

4.2.1 Select Recipients

Click the **Send File** button on left sidebar to go to the *Select Recipients* screen.

The screenshot shows the 'Secure File Delivery Service' interface. On the left is a sidebar with the following items: 'B.C. Home', 'Ministry of Health', 'HealthNet B.C.', 'Inbox', 'Send File', 'Bulletins', 'Administration', 'Application List', and 'Exit this e-service'. The main content area is titled 'Select Recipients' and includes a 'From:' dropdown menu with 'odtd07' selected, a 'To:' dropdown menu with 'One Time Data Transfer 07' selected, and a 'Receive files' link with a question mark icon. A 'Select File' button is located at the bottom right of the form area. The top right of the page shows 'Contact Us' and 'Help' links, and the user is logged in as 'Jodi L. Harding'.

Figure 13 – Select Recipients Screen

Choose a Sender and Recipient by entering values in both of the From and To fields.

Fields	
From	Dropdown. Choose a Sender (if available).
To	Dropdown. Choose a Recipient.

Then click the **Select File** button to select a file as described below.

4.2.2 Select File

Click the **Select File** button to go to the *Select File* screen.

The screenshot shows the 'Select File' interface. On the left is a navigation sidebar with 'B.C. Home', 'Ministry of Health', 'HealthNet B.C.', 'Inbox', 'Send File', 'Bulletins', 'Administration', 'Application List', and 'Exit this e-service'. The main content area has the title 'Secure File Delivery Service' and 'Select File'. It shows 'From: otdtd07' and 'To: One Time Data Transfer 07'. A 'Select File to Send:' section contains a text input field with a 'Browse...' button. Below this is an information icon and text: 'Enter file name or use the Browse button to select a file from your local system. Click Send File to complete the transaction.' There is also a checkbox for 'Send Confirmation when file received' and a 'Send File' button. The footer contains the date '21-Sep-2006' and links for 'COPYRIGHT', 'DISCLAIMER', 'PRIVACY', and 'ACCESSIBILITY'.

Figure 14 – Select File Screen

Click the **browse** button to find the file you want to send, or type the file name in the *Select File to Send* box (make sure the path is correct.)

You can check the “send confirmation when file received” box to receive an email when the recipient picks up the file.



Warning:

The maximum length of time a file will remain on the Ministry server is 30 days. The file will be deleted from the client's mailbox and the Ministry of Health mailbox after 30 days. It is important that you download and save your files in this timeframe.

Click the **Send File** button.

**Warning:**

If you send a file with the exact same name as a file you have already sent, the previous file will be replaced.

A File Upload Status box will display.

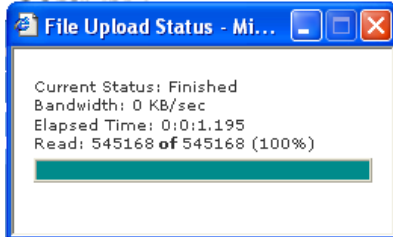


Figure 15 – File Upload Status Box

After the file has been successfully sent, an *Acknowledgement of File Send* screen will display.

Figure 16 – Acknowledgement of File Send Screen

Click **Ok** to return to your inbox.

4.3 Bulletins

Click the **Bulletins** button on the left side bar to open the *Bulletins* screen



The screenshot displays the 'Secure File Delivery Service' interface. At the top left is the British Columbia logo. The top right contains 'Contact Us' and 'Help' links. The left sidebar includes 'B.C. Home', 'Ministry of Health HealthNet B.C.', 'Inbox', 'Send File', 'Bulletins', 'Administration', 'Application List', and 'Exit this e-service'. The main content area shows the service title and the user 'Jodi L. Harding'. Below is a 'Bulletins' section with a table:

Name	Expires	Title
Edit Use Change	2006/Dec/31	Bulletin Regarding Changes to the Edit U

At the bottom, there is a date '26-Oct-2006' and a footer with 'COPYRIGHT | DISCLAIMER | PRIVACY | ACCESSIBILITY'.

Figure 17 – Bulletins Screen

Bulletins are displayed in a list on the Bulletins screen. Each entry is a hyperlink. Click the hyperlink to display a standard Windows file download box. Follow the prompts to download the bulletin file to your local pc.