

ShareFile User Guide

For contracted providers to the Ministry of Social Development



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Introduction

The ShareFile portal is a tool for securely sending and receiving your business files online. It is used as a password-protected area for sharing information between the Ministry of Social Development (the Ministry), Ministry of Housing and Urban Development and contracted providers. ShareFile is used instead of email as a secure way of transferring information.

ShareFile is used as the primary source of sharing information with contracted providers for the following initiatives:

- Emergency/Transitional Housing
- Housing First
- Sustaining Tenancies
- Supported Accommodation for Youth
- Tenancy Review

ShareFile is also used for sharing information with contracted providers for Income Related Rent Subsidy (IRRS) contracts for when Business Online Services (BOS) not available.

See Appendix One - ShareFile Access Request Form

Please refer to your **BOS User Guide** and **Operational Guidelines** for instructions on how to administer and submit requests when instructed to follow the Business Continuity Plan (BCP).

Note: When you are required to use ShareFile for BCP, you can click the link below to access the relevant forms from the Ministry's housing website: housing.msd.govt.nz/information-for-housing-providers/irrs-tenancies/sharefile-forms.html

Privacy Requirements

You are expected to comply with the usual requirements of the Privacy Act 1993 by protecting all personal information belonging to your clients. You should tell your clients what you are doing with their information, how it will be stored and they can request access to it. You need to let your Organisation and the Ministry know if there are any privacy incidents or compromises regarding client personal information. For further privacy information or advice following any privacy breaches please contact: PrivacyOfficer@msd.govt.nz

Requesting Access

Requesting access to ShareFile is initiated through your Contract/Relationship Manager within the Ministries. This person will best understand what access your organisation will need and is required to endorse the access requested.

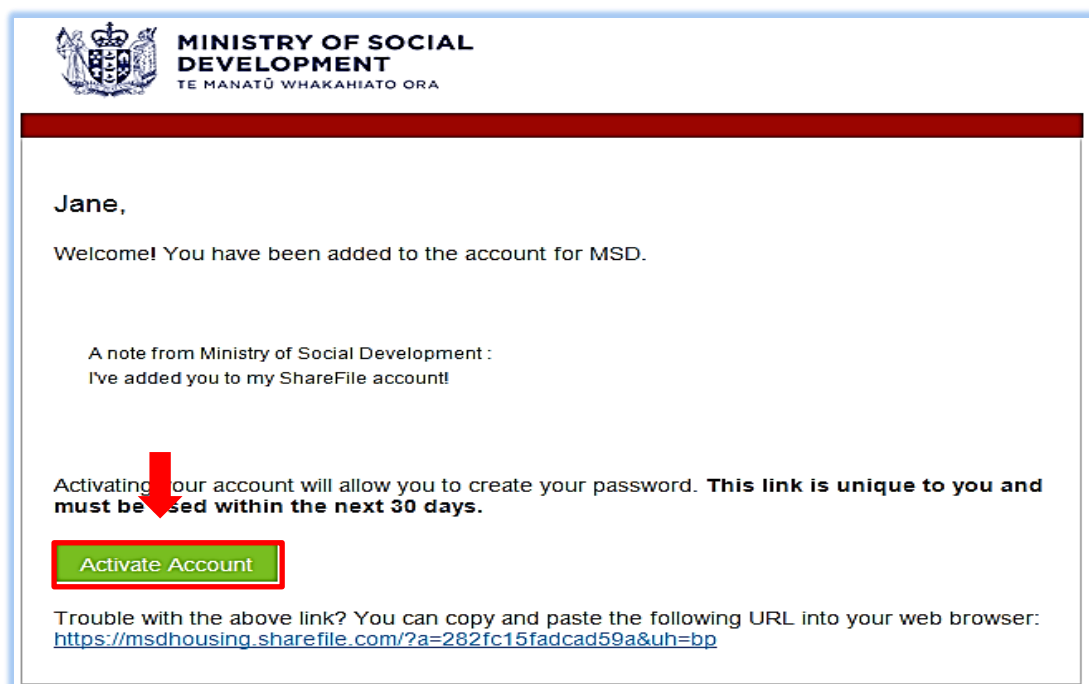
It is suggested that you have at least two employees who will have assigned access. Often those who have assigned access are Service Managers/Team Leaders who oversee initiatives, and employees who report back to the Ministry within your organisation. Please note this is only a suggestion, and access can be granted to who your organisation feels appropriate. This even counts when you require access to different provider files.

Only valid company email addresses can be used for information sharing with the Ministry via ShareFile. Email addresses from public email providers e.g. Hotmail, Gmail, Xtra, or shared/group users e.g. admin@provider1.org.nz, will not be given access.

A ShareFile access request form must be completed in full and sent to: Housing_Provider_Support@msd.govt.nz for processing.

Getting Started

Once users have been assigned access, the user will receive an email with a link to register and activate their access to ShareFile.



By clicking on 'Activate Account' you will be asked to confirm your personal information.



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1 2

Welcome! Please confirm your personal information.

First Name :* * Required

Jane

Last Name:*

Doe

Company :

Provider 1

Continue

Click 'Continue'.

Enter your password and click 'Save and Sign in'. You will be able to access ShareFile using your new password.



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✓ 2

Your username is [REDACTED]

Please create a password.

Please create a password that meets the following requirements:

- ✓ at least 1 Upper Case letter
- ✓ at least 1 Lower Case letter
- ✓ at least 1 number
- ✓ at least 8 characters in length
- ✓ Password and Confirm Password should match

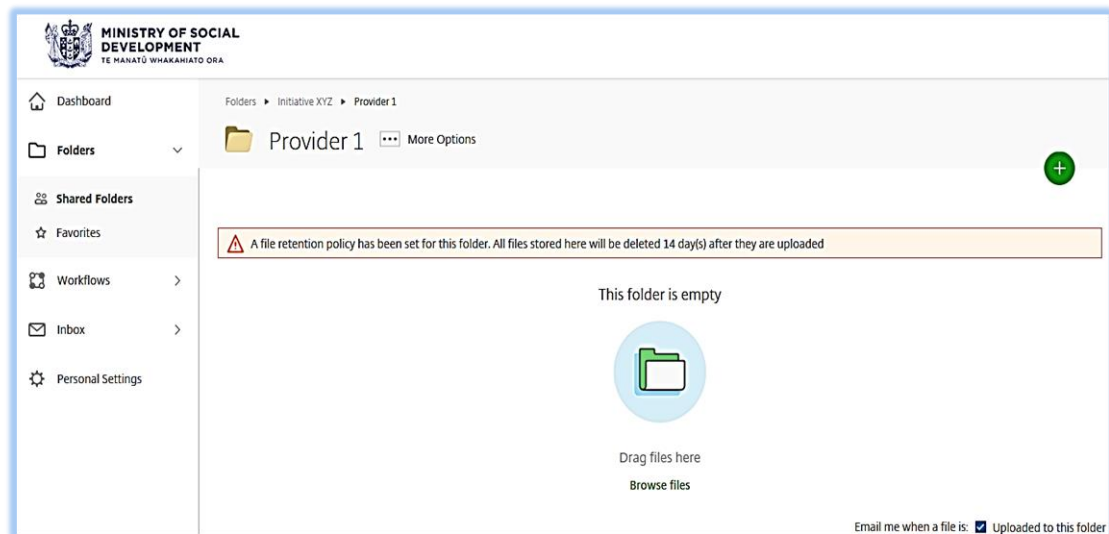
Password: Show Password

Confirm Password:

Please take note of the requirements to set your new password.

Note: If you cannot remember your password, please contact your Contract/Relationship Manager for assistance, or email: Housing_Provider_Support@msd.govt.nz

Once you have completed the registration stage, the folders you have been given access to will be displayed.




Note: You can bookmark the ShareFile page in your internet browser for future reference: <http://msdhousing.sharefile.com/>

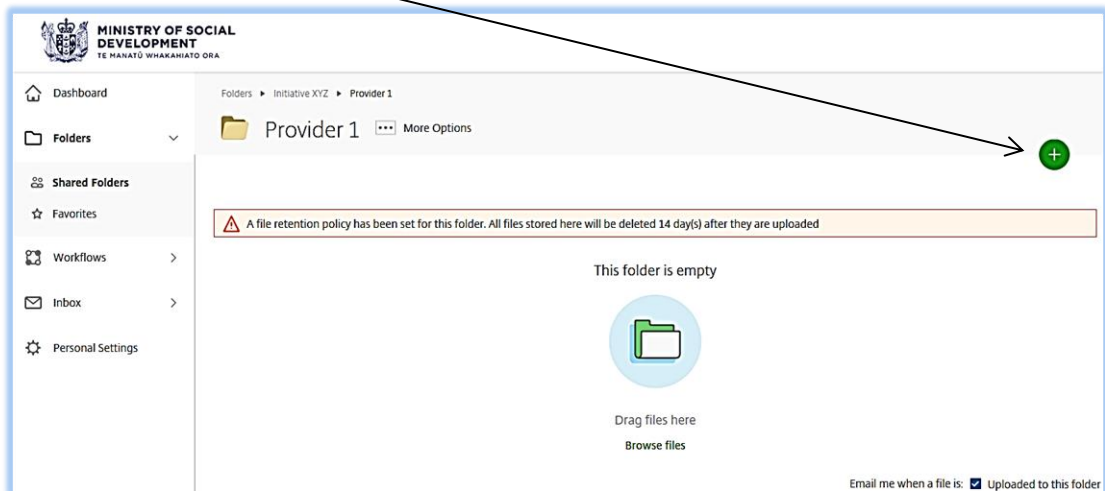
Uploading Files

When you are required to share information on a contracted frequency or on an *ad hoc* basis you can upload files to ShareFile. You can also upload files when you deem it necessary to the initiative you are working on.

Examples of uploading files include:

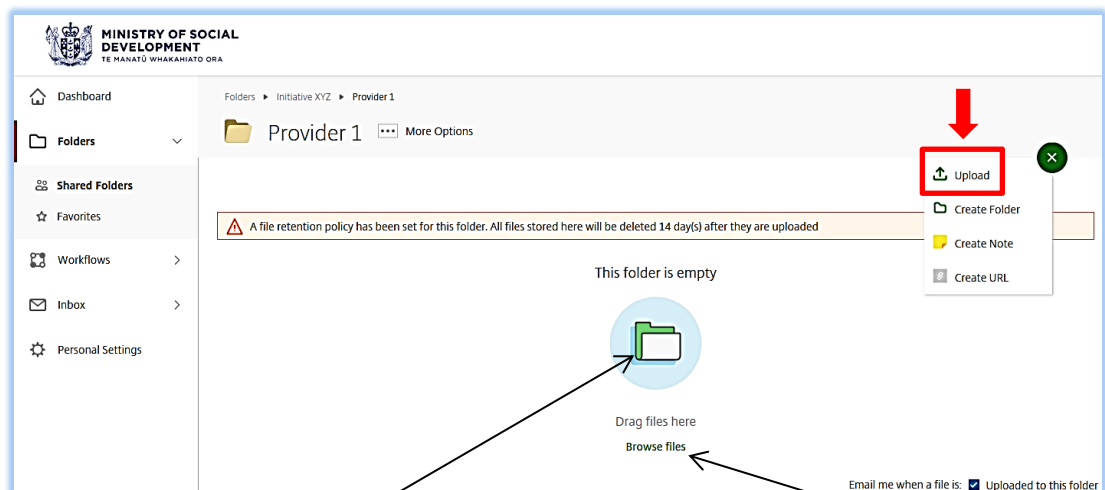
- Weekly, monthly and/or quarterly reporting - To be filed in your contracts ShareFile folder
- SNGs, Referrals, client stuff to be filed in your Emergency Housing ShareFile folder
- Vacancy and market rent approvals (BCP).

Navigate to the  icon on the right hand side of your screen.



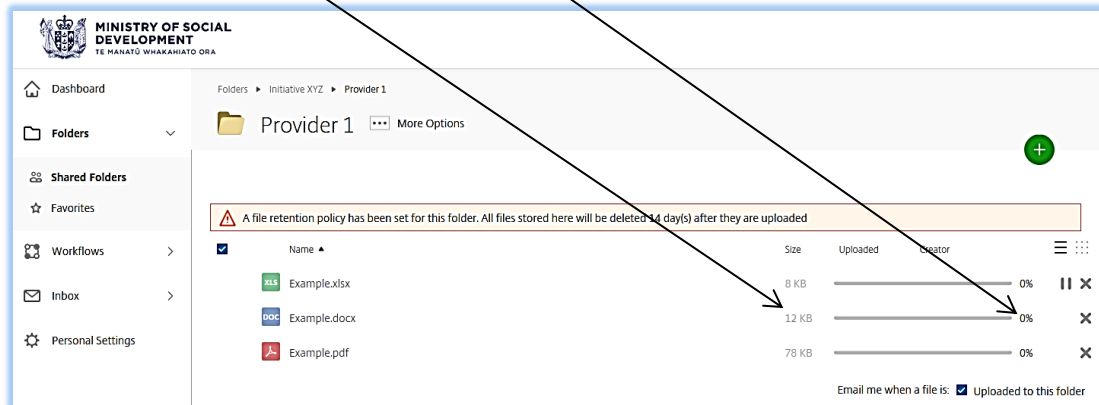
Click to display the option to upload a file.

Click the 'Upload' option.



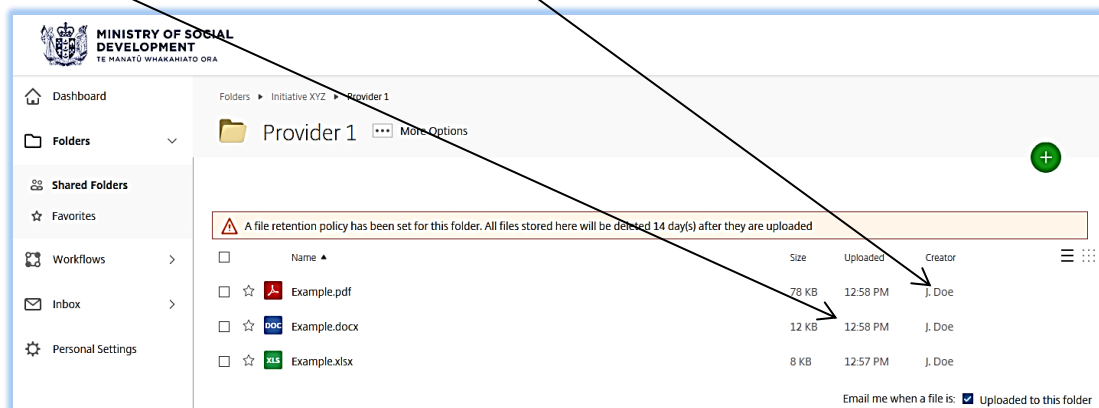
You can either **drag a file** from your desktop or click **browse files** to select from a file from your system.

When you have either dragged or selected the file(s) you wish to upload, you will see the **size** and **progress rate** of the file(s) being uploaded.



Note: As per the file retention policy, all files will be deleted 14 days after they are uploaded.

When the file(s) has been successfully uploaded, the file(s) will be **time stamped**, and will show the **person** who uploaded the file(s).



When the file has been uploaded, the people who have access to the folder will receive a notification that a document has been uploaded.

Note: Ensure that you have correctly uploaded your files to the right folder



Notification Summary

Below is a summary of upload and download activity on folders for which you've chosen to be notified.

Uploads

Initiative XYZ > Provider 1

Name: Example.docx

Size: 12.21 KB • **Created:** 14/02/18 1:17p

Creator: Jane Doe (Provider 1)

Name: Example.pdf

Size: 77.87 KB • **Created:** 14/02/18 1:17p

Creator: Jane Doe (Provider 1)

Name: Example.xlsx

Size: 8.18 KB • **Created:** 14/02/18 1:17p

Creator: Jane Doe (Provider 1)

Download These Items

Downloading Files (a)

You are required to download files when information is shared with you that is relevant to the initiative you are working on.

Examples of this include:

- Contract information relevant to Relationship Managers and/or Service Managers
- Client/tenant information that is relevant to case managers, social workers and/or navigators.

When the file(s) have been uploaded, you will receive an email notification showing an option to download the file(s) relevant to you.

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Notification Summary

Below is a summary of upload and download activity on folders for which you've chosen to be notified.

Uploads

Initiative XYZ > Provider 1

Name: Example.xlsx
Size: 8.18 KB • Created: 2/14/18 12:30p
Creator: M. Administrator

Name: Example.docx
Size: 12.21 KB • Created: 2/14/18 12:30p
Creator: M. Administrator

Name: Example.pdf
Size: 77.87 KB • Created: 2/14/18 12:30p
Creator: M. Administrator

Download These Items

Click 'Download These Items'.

One you have clicked 'Download These Items', you will be directed to where you can **select** the file(s) you want to download.

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Select All

Sort By Name ▾ ☰ ☰ ☰

<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
	Example.docx		Example.pdf		Example.xlsx
	12 KB		78 KB		8 KB

0 Items Selected

Download

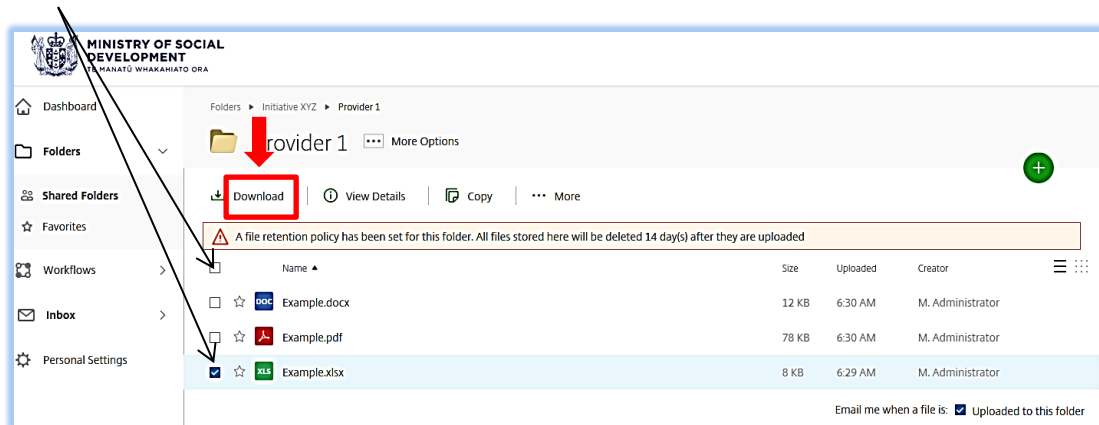
Click 'Download'.

When you have selected the file(s) you want to download, you will have the option to **save** the file to your system and/or open.



Downloading Files (b)

If you are already logged into ShareFile and are in the folder, you can **select** the file(s) you want to download.



Click 'Download'.

When you have selected the file(s) you want to download, you will have the option to **save** the file to your system and/or open.



Other Functions

Create Folder:

Creating separate folders will help you organise your information and make it easier for you and the intended recipient to understand what information is being shared for what purpose.

Examples of this could be creating separate folders for:


- Reporting
- Client/tenant information

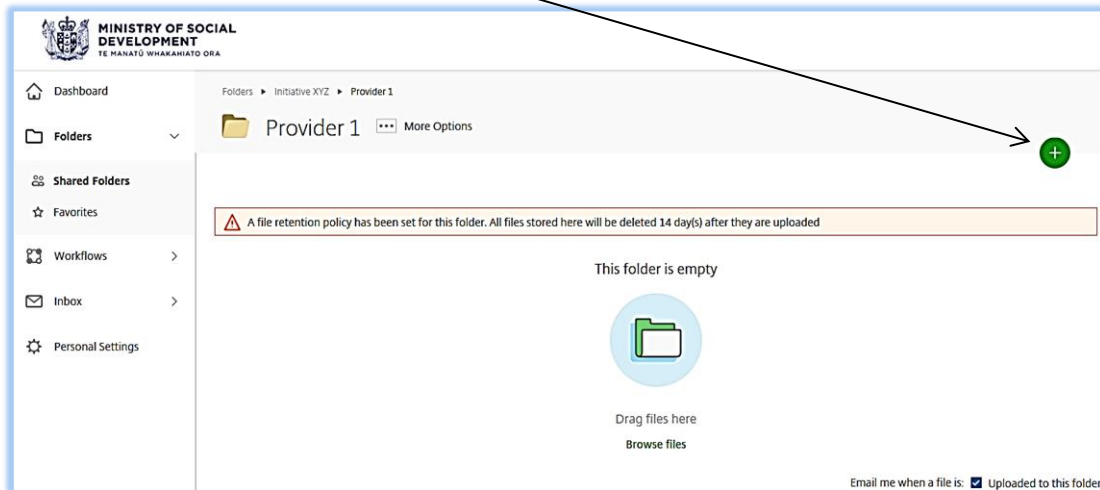
You can also create sub-folders within the newly created folders to help you further organise your information.

Examples of this could include:

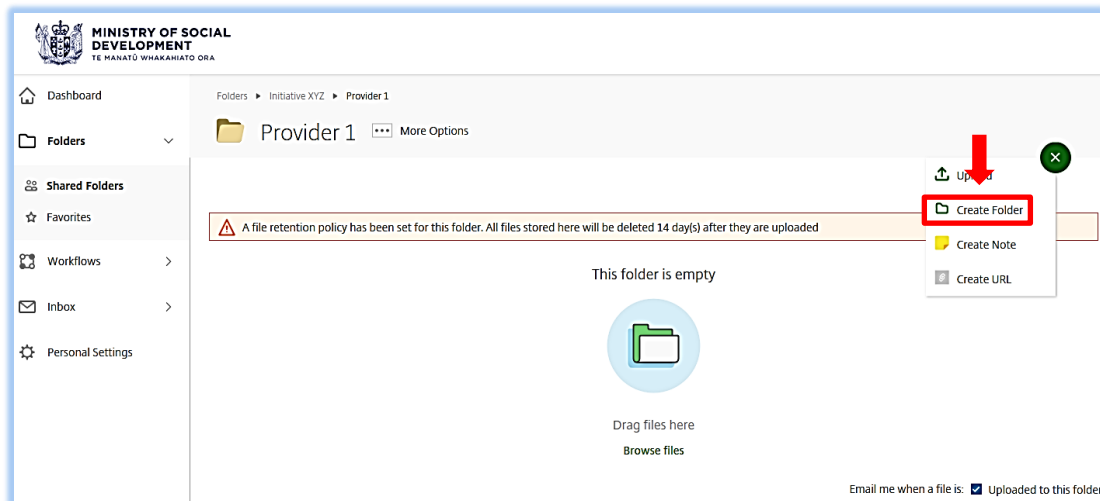
- Reporting

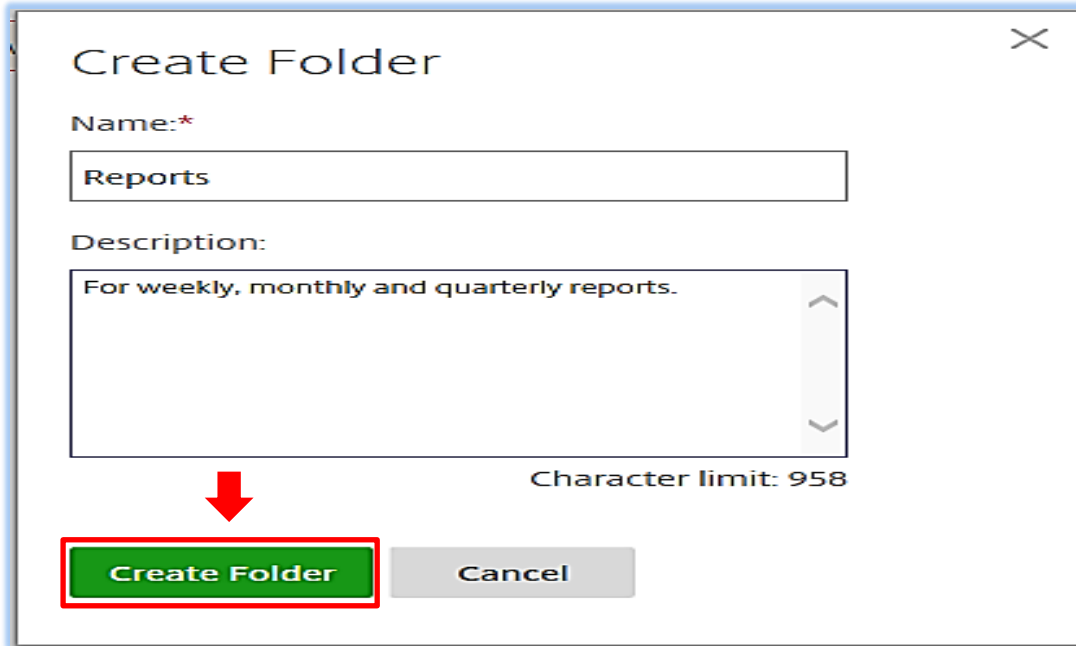
- 1. January
- 2. February
- 3. March
- Client/tenant information
 - Referrals
 - Consent forms

Navigate to the  icon on the right hand side of your screen and click to display the option to create a folder. Click the 'Create Folder' option.



Click the 'Create Folder' option.





Create Folder

Name:*

Reports

Description:

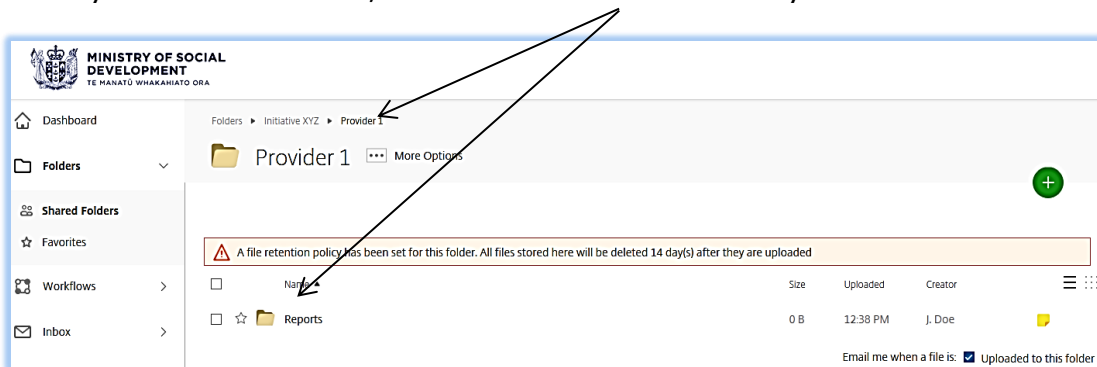
For weekly, monthly and quarterly reports.

Character limit: 958

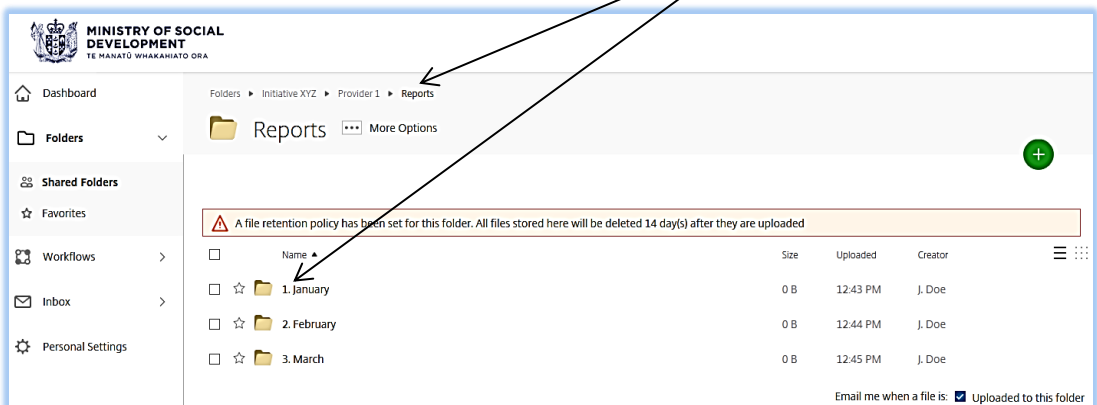
Create Folder Cancel

Fill in the boxes and click 'Create Folder'.

When you create a folder, this will be **located** within your main folder.



When you create sub-folders, these will be **located** within the newly created folders




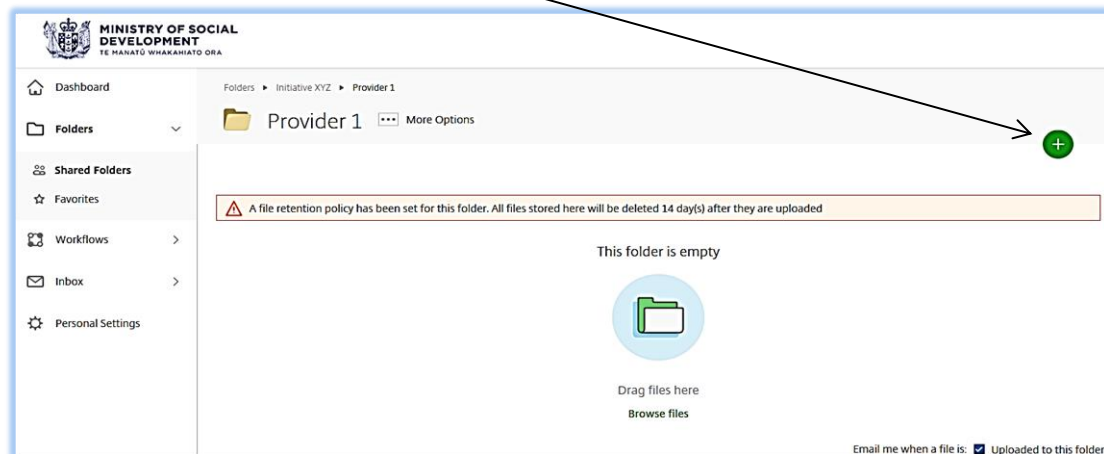
Create Note:

When you want to highlight any important information in the folder for another person, you can leave a note for them.

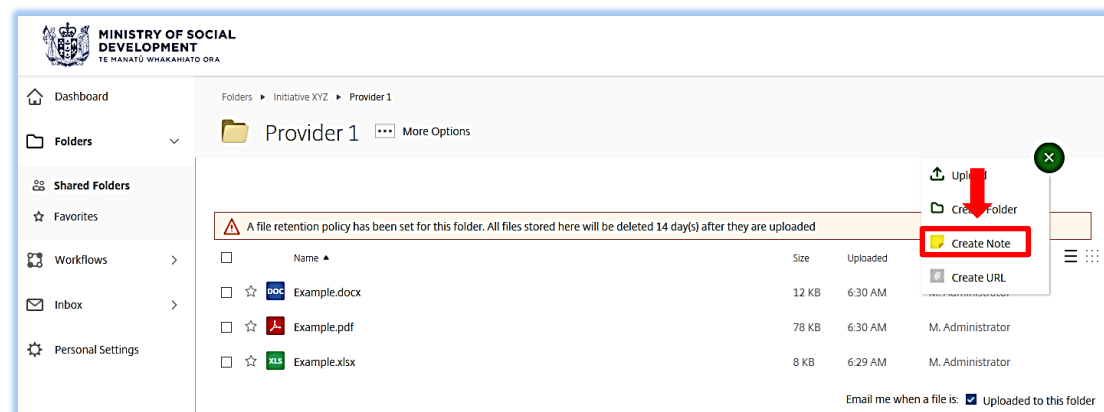
Examples of when you could leave a note include:

- Deviations from normal reporting practices
- Information that requires immediate attention
- Any information you feel relevant to files that have been uploaded.

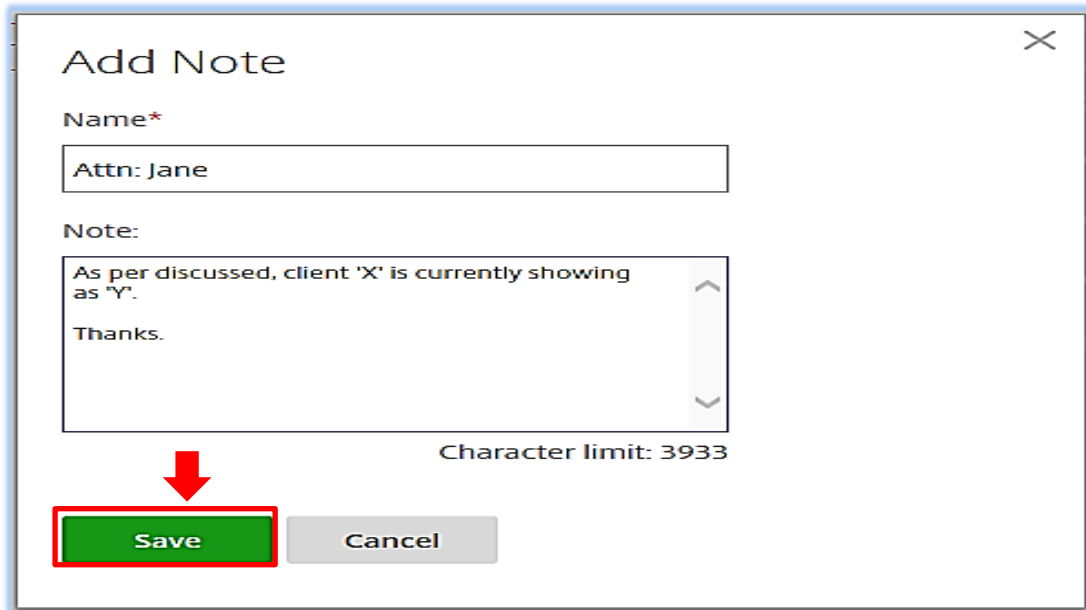
Navigate to the  icon on the right hand side of your screen and click to display the option to create a note.



Click the 'Create Note' option.



Create the note for the intended person and click 'Save'.



Add Note [Close]

Name*
Attn: Jane

Note:
As per discussed, client 'X' is currently showing as 'Y'.
Thanks.

Character limit: 3933

Save Cancel

When the note has been created, a notification will be sent to the people that have access to the folder.



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Notification Summary

Below is a summary of upload and download activity on folders for which you've chosen to be notified.

Uploads

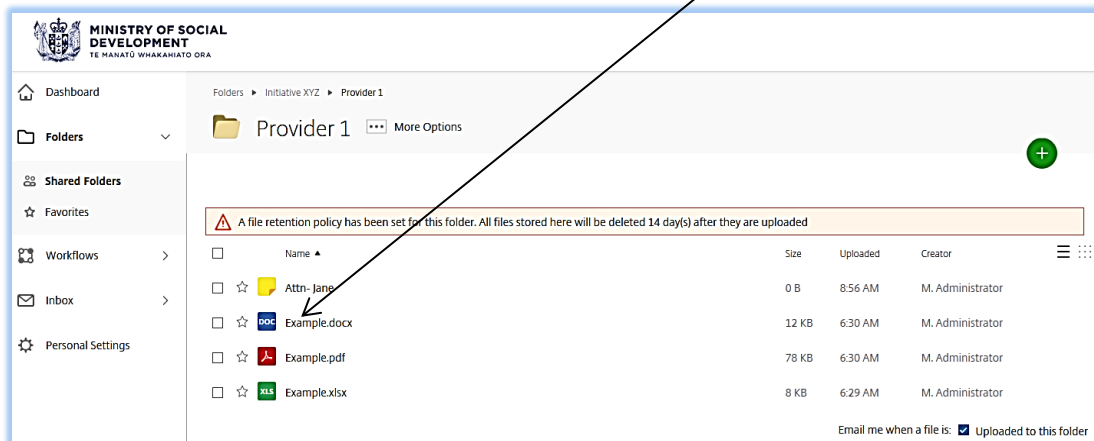
Initiative XYZ > Provider 1

Name: Attn- Jane
Size: 0.00 B • **Created:** 2/14/18 2:56p
Creator: M. Administrator

[Download These Items](#)

Refer to 'Downloading Files' section for instructions.

Once you are directed to your folder, the **note** will be available for viewing.



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Dashboard | Folders > Initiative XYZ > Provider 1

Provider 1 [More Options]

Warning: A file retention policy has been set for this folder. All files stored here will be deleted 14 day(s) after they are uploaded

<input type="checkbox"/>	Name	Size	Uploaded	Creator
<input type="checkbox"/>	Attn- Jane	0 B	8:56 AM	M. Administrator
<input type="checkbox"/>	Example.docx	12 KB	6:30 AM	M. Administrator
<input type="checkbox"/>	Example.pdf	78 KB	6:30 AM	M. Administrator
<input type="checkbox"/>	Example.xlsx	8 KB	6:29 AM	M. Administrator

Email me when a file is: Uploaded to this folder

90 Day Access Review

As part of maintaining the integrity and security of client information, a review of ShareFile access for all your employees is required. This is to be undertaken by your organisation every 90 days. The review should include, but is not limited to:

- Frequency of use
 - on-going access requirements based on need
- Employee changes within your organisation
 - Have employees changed initiative and has access removal been requested for folders no longer required?
- Employees leaving your organisation
 - Have employees left your organisation and has access removal been requested?

MSD will also conduct the 90 Day Access Review asking for up to date information regarding staff access to ShareFile.

Requesting Access Removal

Requesting access removal from ShareFile is to be initiated through your Contract/ Relationship Manager within the Ministry. This person will be responsible for submitting this request for you.

When an employee changes initiatives or leaves your organisation, it is important to request removal of access immediately to avoid any potential privacy breaches.

Note: When requesting access removal, it is important to ensure there is a replacement person to be assigned access, or there is already another person that has access to the relevant folder. Please see 'Requesting Access' section. A ShareFile access request form will need to be submitted.

If you are unable to contact your Contract/Relationship manager, you can email: Housing_Provider_Support@msd.govt.nz for assistance.

Appendix One - ShareFile Access Request Form

ShareFile Access Request Form	
Provider Details:	
Provider Name:	Click here to enter provider name.
Provider Manager:	Click here to enter name.
Provider Manager Role:	Click here to enter role.
Details of Person Requiring Access:	
Person Name:	Click here to enter person name.
Role:	Click here to enter person's role.
Email Address:	Click here to enter person's email address.
Request Details:	
Request Type:	Select a request type.
Shared Folder:	Select a shared folder.
If Emergency Housing Response Folder Access is Required:	Select an emergency housing folder.
Region:	Select the region.
If request is for multiple folders – please state:	Click here to enter other folder access required.
Additional Information:	
Please state any additional information:	Click here to enter additional information.
Approved By (MSD use only):	
I confirm that the above named person requires access, as outlined above, to 'ShareFile' for administrative purposes under the provider's outcome agreement with the Ministry.	
Regional Contracts Manager / Provider Liaison name:	Click here to enter name.
Regional Contracts Manager / Provider Liaison Role:	Click here to enter role.
Date:	Click here to enter a date.

