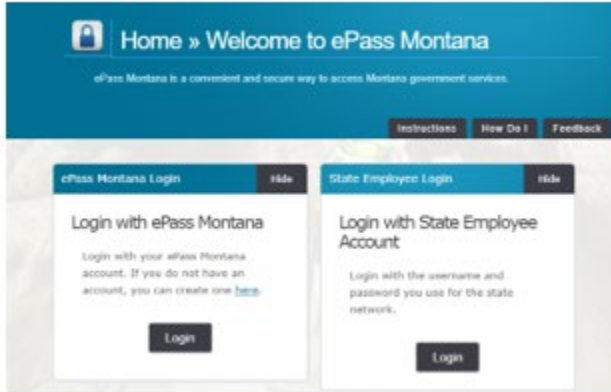


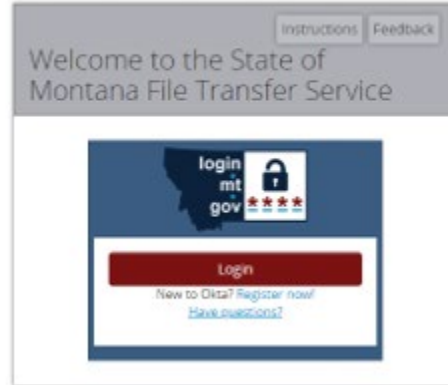
Montana File Transfer Service

Go to the State of Montana File Transfer Service (FTS) - <https://transfer.mt.gov> to upload your documents. The state is converting from ePass single sign on to OKTA single sign on March 22, 2022 which is used to access this service.

ePass Single Sign On (SSO)

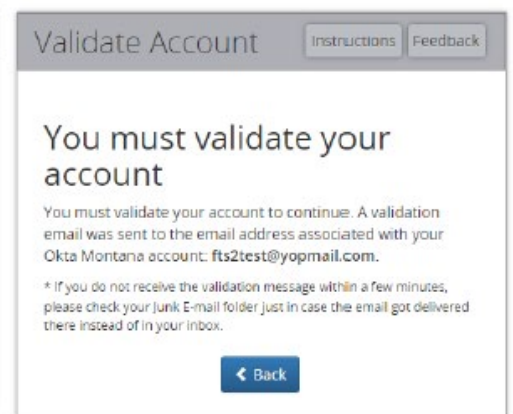
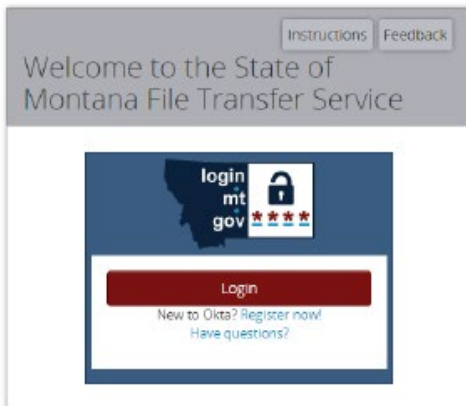


OKTA SSO



Creating an OKTA account:

1. Select *Register now!* from the Login screen.
2. Enter your email address, first name, last name, then click on submit.
3. Check your email and click on the link to validate your OKTA account.



4. You will be directed to a web page. Enter a password, security question and security image, then select *Create My Account* at the bottom of the screen.

Enter new password

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Your password cannot be any of your last 4 passwords

Repeat new password

Choose a forgot password question

What is the food you least liked as a child?

Answer

Click a picture to choose a security image

Your security image gives you additional assurance that you are logging

5. Return to the login screen and log in with your email address and password.

Once you are logged in to Montana FTS, the file transfer process will look the same – please see below for FTS instructions.

File Transfer Service- Upload x +

transfer.mt.gov/upload

MONTANA FILE TRANSFER SERVICE Logged in as: Sue Rickman (Suzanne.Rickman@mt.gov) Logout ePass Montana Home

Select Files To Upload Instructions Feedback

Drop Files Here or Click to Upload

FW_Public Information Request.mng

Tips and Tricks

- Uploading folders is not supported.
- Only 10 files can be uploaded at a time. If more than 10 files need to be uploaded, upload them as a zip file.
- Any file that exceeds 2GB within a zip file may experience virus scanning issues.

[Back](#) [Continue](#)

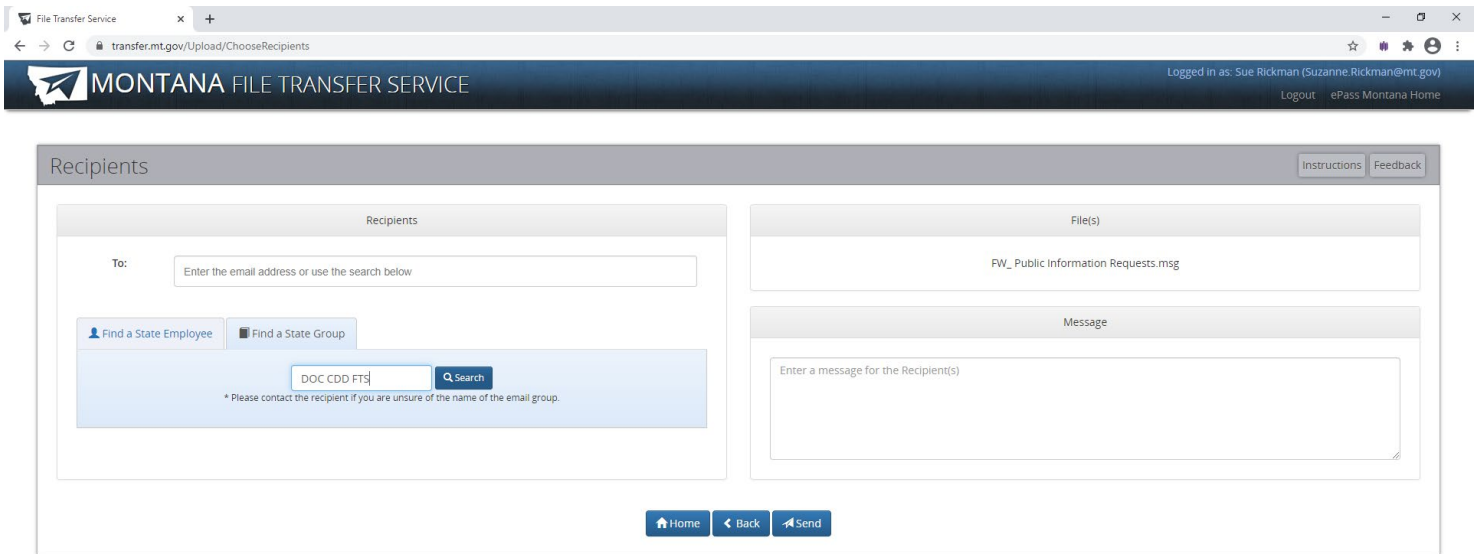
Download files

Select "Continue"

The screenshot shows a web browser window with the URL transfer.mt.gov/Upload/RecipientOptions. The page title is "Recipient Options" and it includes "Instructions" and "Feedback" links. The main content area is titled "Please select the appropriate link below:" and is divided into two columns. The left column has two sections: "General" with a blue button for "State Employee or ePass Montana Customer", and "Unclaimed Property Reports" with buttons for "Holder Reports", "Unlocatable Mineral Holder Reports", "Audit Holder Reports", "Audit Unlocatable Mineral Holder Reports", and "State Reciprocity Reports". A yellow box below these buttons states: "Unclaimed Property Holder Reporting is now available in our [TransAction Portal \(TAP\)](#), letting you submit your reports and make e-check payments in one place. Files submitted through TAP are checked for formatting as you submit them, saving you time." The right column has a "Tax Forms" section with sub-sections: "Income Tax Refund" with a "Refund Verification" button; "Withholding Reporting" with "W-2 Forms" and "1099 Forms" buttons; and a yellow warning box: "Warning! .PDF .XLS .XLSX .XLSM .DOCX .JPG files cannot be processed." Below the warning box, it says: "You can file your W-2s, 1099s & the MW-3 (Annual Reconciliation) online using the Transaction Portal (TAP). More information is available online at revenue.mt.gov or email DOR-services@mt.gov for assistance." At the bottom of the page are "Home" and "Back" buttons.

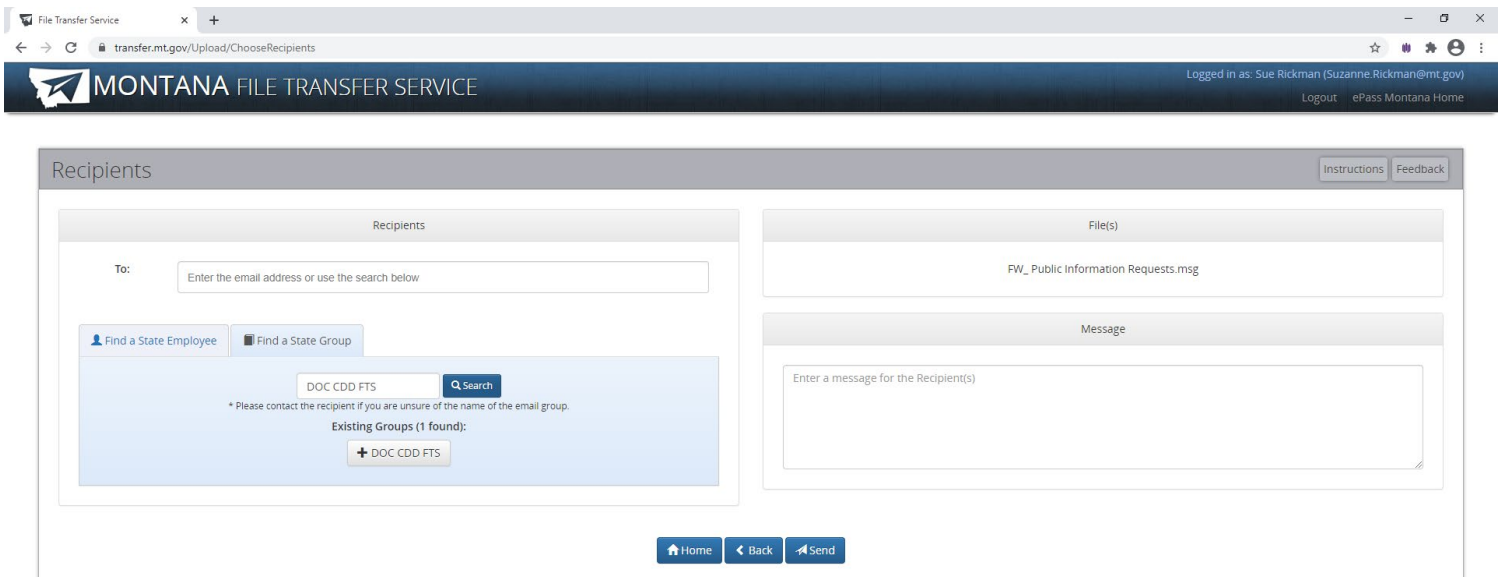
Under General

Select blue box "State Employee or ePass Montana Customer"



Select “Find a State Group”

In “Search” type in DOC CDD FTS and hit “Search”



Select the (1 found) + “button”

The screenshot shows the 'Recipients' page in the Montana File Transfer Service. The page has a header with the logo and 'MONTANA FILE TRANSFER SERVICE'. The user is logged in as 'Sue Rickman (Suzanne.Rickman@mt.gov)'. The main content area is divided into three sections: 'Recipients', 'File(s)', and 'Message'. In the 'Recipients' section, the 'To:' field contains 'DOC CDD FTS'. Below it is a search bar with 'Group Name' and a 'Search' button. The 'File(s)' section shows 'FW_Public Information Requests.msg'. The 'Message' section has a text area for entering a message. At the bottom, there are buttons for 'Home', 'Back', and 'Send'.

When “group” name DOC CDD FTS appears in the “To” box; select “Send”

The screenshot shows the 'Sent Receipt' page in the Montana File Transfer Service. The page has a header with the logo and 'MONTANA FILE TRANSFER SERVICE'. The user is logged in as 'Sue Rickman (Suzanne.Rickman@mt.gov)'. The main content area displays a success message: 'Upload success! The below files have been uploaded: FW_Public Information Requests.msg. The file(s) will be delivered* to: DOC CDD FTS (DOC CDD FTS)'. Below the message, there is a note: '* Pending a successful virus scan. Check the file(s) status by referring to your sent box.' At the bottom, there are buttons for 'Print' and 'Continue'.

Upload success.