

User Guide for Kiteworks

Secure File and Document Exchange

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Overview

KFMC Health Improvement Partners offers secure electronic exchange of documents and files using Kiteworks, a HIPAA and HITECH compliant, SOC2 + HITRUST certified, managed file transfer (MFT) system whose features include

- Self-service password resets for user convenience
- Automated email notifications to ensure you never miss important communications
- Time-stamped uploads to confirm timely document submissions.

If you experience any difficulties with Kiteworks, please email *is-helpdesk@kfmc.org* and we will be happy to assist you!

Contents

Overview 1

Logging in 2

Account Lock Out 4

Changing Your Password 5

Navigating to folders 7

Downloading files 9

Uploading files 10

Logging in

If you receive an email from KFMC asking you to upload a file or notifying you that files have been shared with you, click the link in the email. If you want to log into the Kiteworks portal directly, without an email link, you can log on at https://kfmc.kiteworks.com/.

1. Enter your username. Your username is the email address used to receive Kiteworks notifications.
2. Click **Next**. Do NOT click ***Login via the external SSO provider***.



Figure 1. Log In

3. Enter your password on the next screen. If you have forgotten your password, you can click ***Forgot password?*** and reset it.

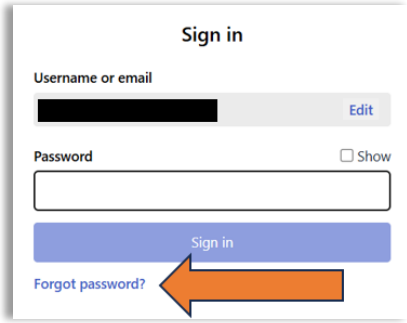


Figure 2. Forgot Password

4. Once you enter your password, the authentication screen will appear and you will receive an email from is-helpdesk@kfmc.org with your one-time passcode. A one-time passcode will be provided every time you log into your KFMC Kiteworks account. Enter the passcode.

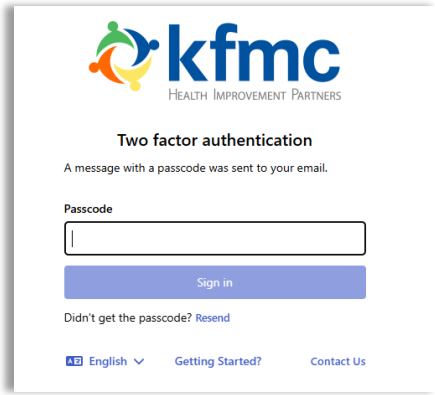


Figure 3. Two Factor Authentication

5. Click **Sign In**.

Account Lock Out

Your account will be locked for 20 minutes if you have three consecutive failed log in attempts, either due to an incorrect password or using a one-time passcode. During those 20 minutes, you will NOT be able to reset your password.

Once the lock out period has expired, attempt to log in again. If you cannot log in successfully after two attempts,

1. Click **Forgot password**
2. Follow the instructions for Changing Your Password.

Changing Your Password

1. Open the Kiteworks application and enter your username/email address.
2. Click **Next**.

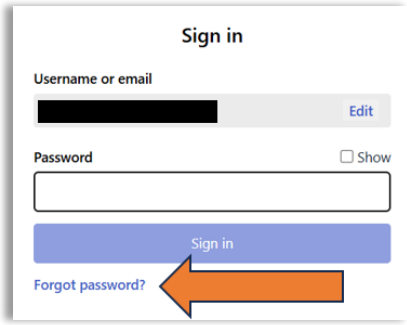


Figure 4. Forgot Password link

3. Click the **Forgot password** link.
4. Enter your Email address, type the captcha code, and click **Send**.

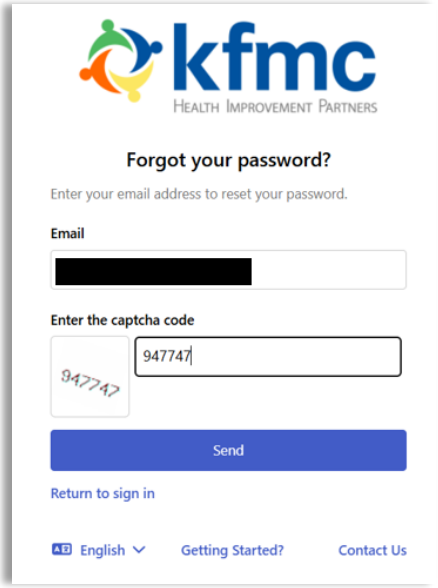


Figure 5. Captcha Code

5. You will receive an email with a link. Click the link to open the **Reset Password** form.

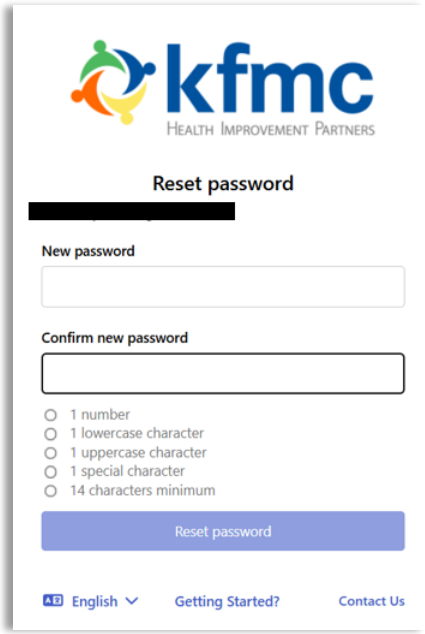


Figure 6. Reset Password

6. Enter your New password ensuring it meets the listed requirements. Re-enter the password in Confirm new password.
7. Click **Reset password**.

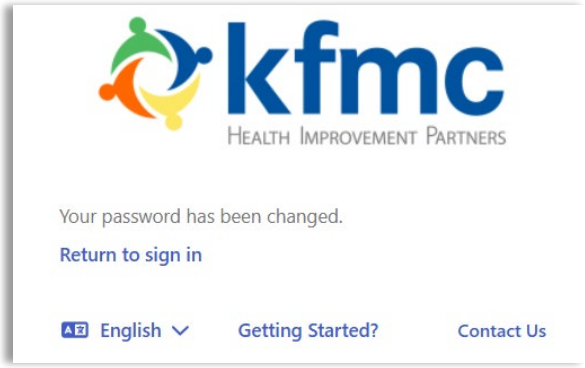


Figure 7. Confirmation of Password Change

If your password values matched, you will receive a message that the password was changed. If the values did not match, re-enter your new password in both fields.

8. Click **Return to sign in** to log in to the application.

Navigating to folders

1. Log in to the application.
2. To see your folders, select **All Files** on the left hand pane once you have logged into your account.

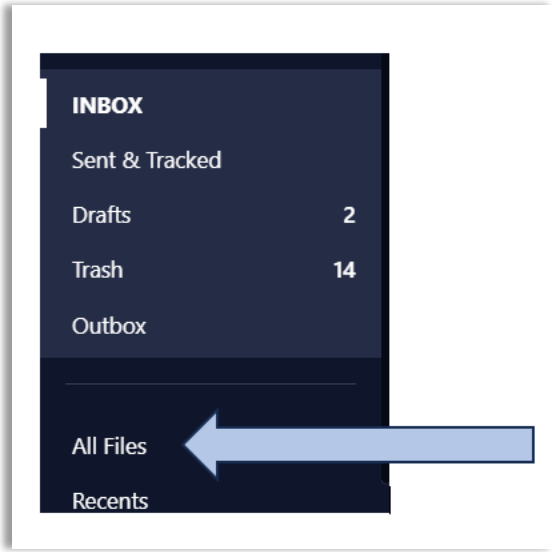


Figure 8. Folder Navigation

You will see a folder with your organization's or your name.

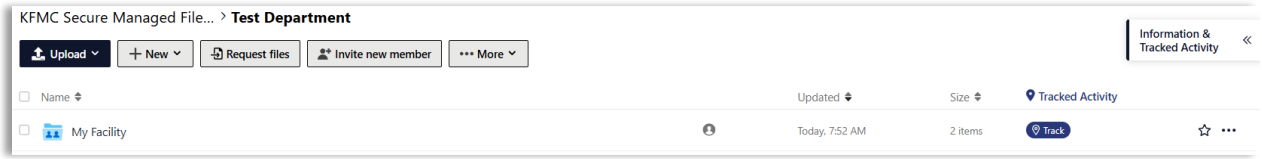


Figure 9. Folder View

3. Click on the folder to open it and see the subfolders.

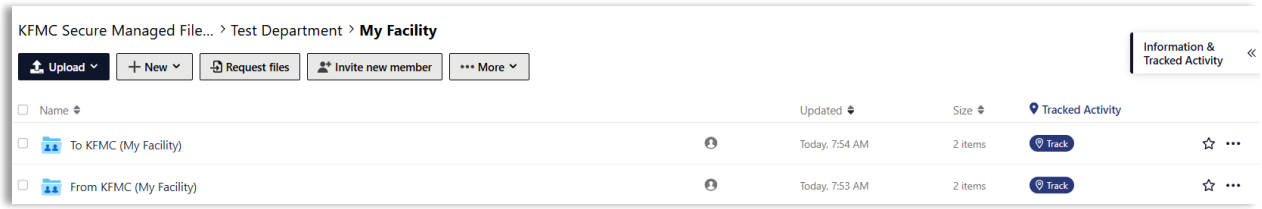


Figure 10. User Folders

Files that KFMC has shared with you will be in the ***From KFMC*** folder for you to download. The only files you can see in the ***To KFMC*** folder will be files that you have uploaded. If others in your organization have uploaded files to the same folder, you will be unable to see them.

Downloading files

1. Log in to the application.
2. Navigate to your directory and double-click the ***From KFMC*** folder.
3. Click the icon on the tool bar located to the far right of the file name to download a single file.

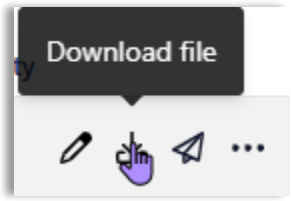


Figure 11. Toolbar - Download

To download multiple files at once, click the checkbox to the left of each file you want to download, and then click **Download** at the top of the file list. If you click Name at the top of the file list, all files will be selected and compressed into a zip folder when downloaded. You can also use the checkbox to download a single file.

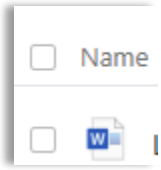


Figure 12. Checkbox to Select Files to Download

4. A ***Save As*** window will open so you can navigate to the location you wish to save the file. Navigate to the directory and click **Save**.

Uploading files

Files should be uploaded to the ***To KFMC*** folder. You can upload one or multiple files or a folder and its contents.

1. Log in to the application.
2. Navigate to your folder and double-click on the ***To KFMC*** folder.
3. Upload documents by browsing your computer for files, clicking the **Upload** button, and selecting Upload files or Upload a folder from the drop down.

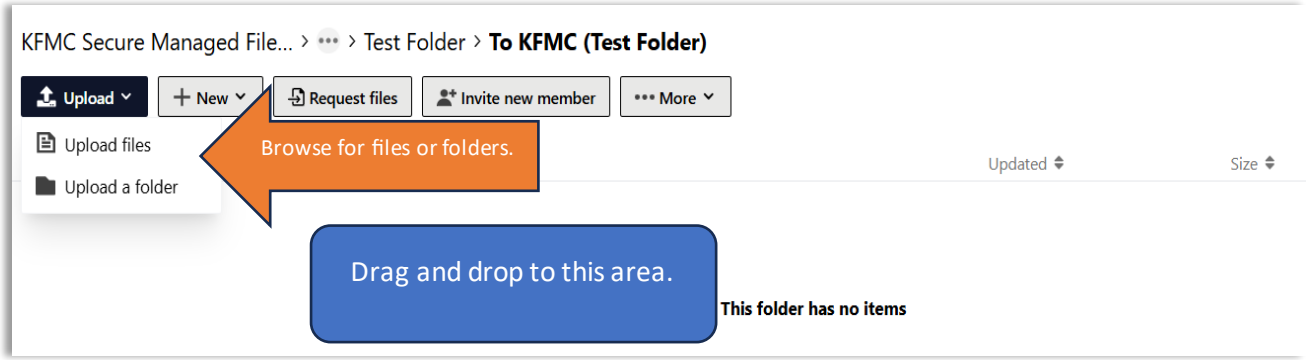


Figure 13. Upload File(s) or Folder

Alternatively, navigate to the location of the files or folder you wish to upload, select the files (multiple selections allowed) or folder on your system, and drag and drop them directly into the opened ***To KFMC*** folder.