PlanSponsorLink Secure File Exchange
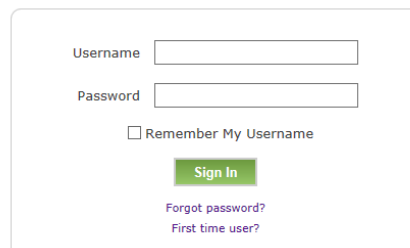
User Instructions

As data security is a critical focus, MGKS wants to make sure clients are submitting sensitive information to us in the most secure way. Due to our continued efforts to provide the most secure file exchange capabilities, we have upgraded our portal. This process is as simple as attaching a file to an email. However, unlike email, by utilizing *PlanSponsorLink Secure File Exchange* (PSL) the file is transmitted via a secure server which encrypts this sensitive data and protects the privacy of this information.

PlanSponsorLink Secure File Exchange (PSL) is a secure method of transferring files. It is not meant to be a browser for viewing files or for storing files. The most efficient method of utilizing this system is to download the file to your computer after you are notified of its arrival. When you are sure that the download is successful, you should delete the file from the server.
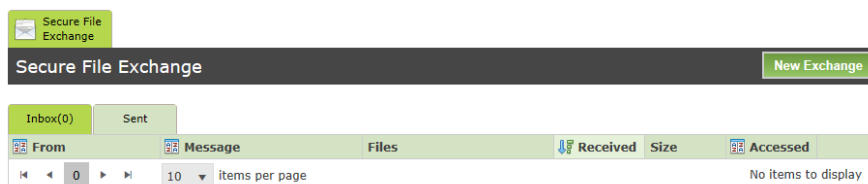
Getting Started

You will soon receive an email message notifying you that your *PlanSponsorLink Secure File Exchange (PSL)* account has been set up and asking you to activate your account by creating your password. If you forget it, the log-in page contains a link where you can request a password reset. After you create your password, you will be taken to the log- in page. For easy access, you may want to save this log-in page in your web browser's "Favorites" or on your desk top.

Spam Filtering Alert: The new account activation email as well as emails telling you a file is waiting for you to download will be coming from admin@plansponsorlink.com. If your spam filtering utilizes a "trusted senders" list or "white list," please add this address so this email will not be blocked.

Once you are logged in to the portal you will see two tabs: Inbox and Sent. The Inbox will display the number of files that have not been downloaded yet and the grid will contain any Secure File Exchange that involves your user. Whenever someone sends a file to you, you will receive email notification that the file has been uploaded to the secure server.
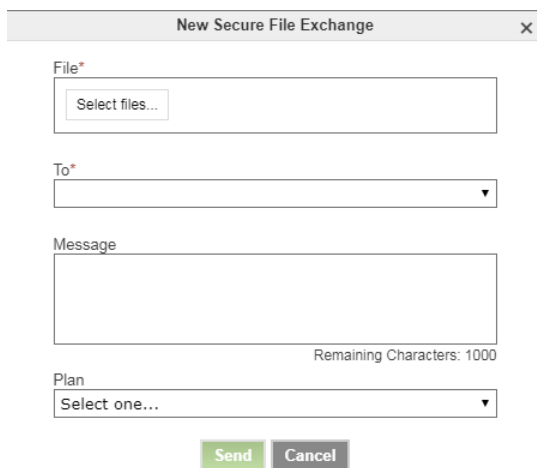
Received Files: The Secure File Exchange Portal opens up automatically to the "Inbox" tab which shows a list of files currently on the server that were sent to you. Click on the file name to download it. You may delete the files after downloading or reading them. To delete a file from the server, select [icon] to delete. Note: All files will automatically be deleted from the server after a predetermined date, depending upon the parameter that was selected when the file was originally sent.

Sent Files: Click on the "Sent" tab which shows a list of files you have sent to others.

Sending Files: This is where you upload your files to the server for another to download.

1. Click on the "New Exchange" button and it will prompt you for the information to send a file.
2. Click on the "Select Files" box and select the file from the appropriate folder on your computer up to 5 files. You also now have the option to drag and drop in to the File box.
3. In the "To" field select from the drop down the MGKS user that the files should be sent to.
4. Enter a message in the message box. Please note that the character count is 1000 characters and the number of remaining characters will be shown below the message box.
5. Select a Plan from the Plan dropdown.
6. Click Send. An email will be sent to the user indicating that a file or files have been uploaded

Important: The maximum file size you can transfer is one gigabyte and five files can be sent at one time. To determine a file's size, on your computer right click on the file name and select "Properties". Depending on your Internet connection and the file size, it may take several minutes to send very large files (this is in part due to the process of encrypting the file).

Changing Your Name or Password

To change your name or password, click the Welcome > Change Password option in the upper right corner of your screen and follow the instructions.

Logging Out

Click the Welcome > Logout link at the top right-hand corner of the page. If you do not log out and there is no activity for 20 minutes, you will automatically be logged out of the system.