



SFTP User Guide

Simple steps for secure eligibility file transfer

WHERE WELLNESS MEETS YOU



SFTP Service by Wellness Coach

Wellness Coach offers an SFTP service for secure and encrypted file transfers. This ensures that all your employee data is transmitted securely.



Steps to Configure SFTP with Wellness Coach

Step 1: File Format Template

[Here is a template csv file](#) that can be used to set up the eligibility file for SFTP sharing. This template includes the headers: **Employee ID, First Name, Last Name, and Email**. More parameters can be included but please discuss with your CSE first.

Step 2: Confirmation of the Eligibility File

Once the template is confirmed between you and your Wellness Coach CSE, Wellness Coach will configure the file format in our system.

Step 3: User Account Creation

On our end, we will create a dedicated SFTP user account for your organization. This account will be used exclusively for the secure transfer of employee detail files.

Step 4: Generation of PEM Files

We will generate a pair of cryptographic keys(SSH Key pair):

- A private key, which will remain securely stored on your side. This public key will be used for establishing a secure connection to our SFTP server. (**NOTE:** If your company would prefer to generate its own private and public keys, please share this public key and it will be attached to your company account)
- A public key, which we will push to our SFTP system.

Step 5: Private Key Distribution

We will share the private key file (.pem) with you. This key enables your team to securely transfer files to our SFTP server without exposing sensitive information.



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Step 6: SFTP File Transfer

Your team can push the employee detail file to our SFTP server using the following command:

```
sftp -i private.pem username@sftp.wellnesscoach.live
```

This command initiates a secure file transfer session to our server, using the provided public key for authentication.

Step 7: Weekly File Publication

We encourage your team to publish the employee detail file on a weekly basis. Each file should encompass all employees requiring access for the upcoming period. This regular update allows us to dynamically manage access, adding or removing permissions based on the latest information.

Step 8: Access Management

Upon receiving each weekly file, our Wellness Coach platform will process the data to identify any additions or removals. Access will then be granted or revoked accordingly, ensuring that only current employees have access to our services.

Final Notes

- It's crucial that the file shared adheres to the agreed format to ensure smooth processing.
- Please use file format as csv
- Preferred file name : <your company name>_<yyyymmdd>.csv

