

Data protection guide

We understand there are instances where we need you to send us sensitive information such as providing identity details within forms, and where we require you to send in copies of identity records.

This guide will provide you step by step information on how you can send us your sensitive information securely.

Data protection options

The two methods we recommend using are:

1. Encrypted files using the software of your choice

When using this method, all documents are password protected and supplied to us by email. We recommend you compress all the files before sending them to us, using software such as 7-Zip or WinZip. More information on how to use WinZip is outlined at the end of this document.

Once we receive your email, we'll call you and ask you for the password to access the documents.

2. Fileshare

This is a secure file sharing service accessible via a web browser and allows users to upload and download information and documents. To begin using Fileshare, follow the steps below.

Fileshare

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| Step 1 | To request access to the Fileshare system: <ul style="list-style-type: none">– Email licensegovernance@btfinancialgroup.com requesting Fileshare set up.– Please provide your email and mobile number, so that we can send you the registration instructions. |
| Step 2 | You'll also need your mobile on hand to complete a two-factor authentication process.
Please note, for security purposes, you'll have 7 days to access the link within the email we send you before it expires. If this occurs, you'll need to contact us and request a new registration email. |
| Step 3 | Open the email we sent you and click on the Fileshare link.
This will take you to the Fileshare website log in and registration page.
Enter your email address and the temporary password from the email we sent you.
If you have already created a Fileshare account with BT within the last 60 days, you can use your existing login details.
You'll be prompted to enter an SMS Authentication Code that will be sent to your mobile phone. For security purposes, the SMS code will only remain valid for 10 minutes so please enter the code within this time.
Note: If the code is not received or expires you can click on the Resend Code option to resend a new code. |

Enter the SMS code received and click on Confirm.

You'll then be prompted to set your own password.

Please note, the password requirements are:

- A minimum of 8 characters
- One upper case letter
- One lower case letter
- One number
- One special character (such as !, \$, #, %)

Note: If you ever forget your password, you can reset it by clicking on More Options below the Login button.

Step 4 After setting your password, you'll be prompted to log in again with your new account and password details.

Step 5 Once you've logged in, you'll have access to your Files Dashboard page.

- Click on the Shared with me folder;
- Then click on the BT folder; and then your Shared with me folder where you can upload your sensitive information. Drag the relevant documents into the middle of the screen or select Upload to attach the documents.

Step 6

- Once your documents have been uploaded, Fileshare will automatically send a notification email to us.
- Once we have downloaded your documents, Fileshare will automatically send you a notification.

FAQs for Fileshare

Do I need to encrypt, zip or password protect my files/folders when using Fileshare?

No, do not encrypt, zip or password protect any files/folders when sharing with Fileshare. The service provides an encryption capability to securely share files and will automatically delete anything that is uploaded with encryption.

What format/types of files can be shared (eg .jpg etc)

Fileshare is for the sharing of sensitive information and large files (over 25MB). Most file types can be shared through the service including Microsoft files, images and PDFs. Do not use the service to share encrypted or executable files or zipped files.

Can I upload multiple files at once?

Yes, you can upload multiple files by either dragging and dropping the files into your personal workspace or by clicking the Upload button on the right-hand side of the Fileshare homepage and selecting multiple files. Users can create a folder and upload the folder (unzipped) to make it easier for upload.

How long will files be stored on Fileshare?

Files will be removed after 30 days after viewing. If a shared file has not been opened within 7 days of sharing the files will be permanently removed. The files will need to be uploaded and shared again.

Is Fileshare compatible with all browsers?

Fileshare is compatible with most of the commonly used web browsers, including:

- Internet Explorer 9 and above
- Google Chrome 25.0 and above
- Mozilla FireFox 24 and above
- Safari 11 and above

How to use WinZip

These instructions will guide you through creating an encrypted file using WinZip:

Step 1	First, right click on the file you wish to compress and encrypt using WinZip (.zip) and then select Add to [Filename].zip from the dropdown menu.
Step 2	Ensure the field Add to archive points to the correct location where the WinZip file will be saved. Tick Encrypt added files and then click Add.
Step 3	<p>You're prompted to enter a password in the Enter Password box. You must also re-enter the password into the Re-enter password (for confirmation) box. Choose 256-Bit AES (stronger) encryption to ensure the contents are safe.</p> <p>Use a unique password that will not be easy for someone else to figure out. It is recommended that you use a minimum of 8 characters that contain 3 of these character groups:</p> <ul style="list-style-type: none">– One upper case letter– One lower case letter– One number– One special character (such as !,\$,#,%)
Step 4	WinZip provides a file compression summary. Click OK once you are ready and your file will be encrypted.
Step 5	<p>Share the password with the recipient. We will call you, and ask you for the password.</p> <p>Once you have completed the steps above, you can then email the Zip archive.</p>

For more information

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