Text2Enroll

Secure File Transfer · powered by HQA, Inc.

WINDOWS

Connect to the Secure SFTP

A one-time setup, about 10 minutes. No technical experience needed.

WHAT HQA SENDS YOU (WHEN YOU REQUEST ACCESS)

Host / Server	**`sftp.engageandretain.io`**
Port	**`22`**
Username	**issued to you by HQA**
Key file	**a private key file HQA emails you — save it somewhere safe**

1. **Install WinSCP** (free). Go to `winscp.net`, click Download, and run the installer with the default options.

2. **Save your key file.** Save the private key HQA emailed you to a folder you'll remember (e.g., Documents).

   If it ends in .ppk it's ready; if not, WinSCP will offer to convert it in the next step — just click Yes.

3. **Open WinSCP** and click **New Site**.

4. **Enter the connection.** File protocol: `SFTP` · Host name: `sftp.engageandretain.io` · Port: `22` · User name: your HQA username. Leave the password blank.

5. **Add your key.** Click **Advanced → SSH → Authentication**, then under "Private key file" browse to the key you saved. Click OK.

6. **Save & Log In.** Click Save, then Login. The first time, click **Yes** to trust the server.

7. **Upload.** Your `/inbound` folder opens. Drag your intake file into it — that's it. We're notified automatically.

HIPAA-compliant. This connection is encrypted end-to-end and access is restricted to your company's folder only. Never send member data by email.

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APPLE

Connect to the Secure SFTP

A one-time setup, about 10 minutes. No technical experience needed.

WHAT HQA SENDS YOU (WHEN YOU REQUEST ACCESS)

Host / Server	**`sftp.engageandretain.io`**
Port	**`22`**
Username	**issued to you by HQA**
Key file	**a private key file HQA emails you — save it somewhere safe**

1. **Install Cyberduck** (free). Go to `cyberduck.io`, download it, and drag it into your Applications folder.
2. **Save your key file.** Save the private key HQA emailed you somewhere you'll remember (e.g., Documents).
3. **Open Cyberduck** and click **Open Connection** (top-left).
4. **Choose SFTP.** At the top of the window, pick `SFTP (SSH File Transfer Protocol)` from the dropdown.
5. **Enter the connection.** Server: `sftp.engageandretain.io` · Port: `22` · Username: your HQA username. Leave the password blank.
6. **Add your key.** Click **SSH Private Key** and choose the key file you saved.
7. **Connect.** Click Connect. The first time, click **Allow** to trust the server.
8. **Upload.** Open the `/inbound` folder and drag your intake file into it — done. We're notified automatically.

HIPAA-compliant. This connection is encrypted end-to-end and access is restricted to your company's folder only. Never send member data by email.