

Bring Your Own Data (BYOD)

Users Process for Imports to the Trusted Analysis Environment (TAE-BC)

The TAE-BC Desktop provides projects (organizational, organizational research, or academic research) with the ability to import additional data, application code, documentation, etc. All incoming information will be de-identified, linkable when applicable, and human reviewed.

The table below outlines the three types of import and qualifying criteria for each method.

For any questions, reach out to MOHAnalytics@gov.bc.ca.

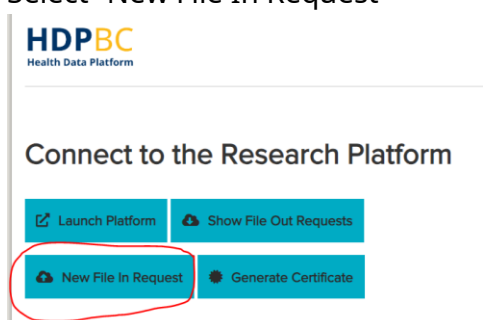
Type of Import	Qualifying Criteria	Transfer Method & Other Info
1. File Import – TAE-BC File In Portal	Use this method if your file: <ul style="list-style-type: none"> Is under 24MB AND does not contain personal or sensitive information. Will not be linked for analysis 	<ul style="list-style-type: none"> TAE-BC File In/File Out Portal Imported by requestor
2. Cohort Import – Ministry of Health (MOH) Secure File Transfer Protocol (SFTP)	Use this method if your file: <ul style="list-style-type: none"> Contains personal or sensitive information (must be encrypted, with patient and provider names <i>excluded</i>) AND/OR is over 24MB. <p>The information may be linked to TAE-BC data for project analysis if applicable.</p>	<ul style="list-style-type: none"> SFTP Imported by TAE-BC Technical Support team Data file should be .csv format Data should be extracted with UTF-8 encoding Metadata information should be included as a .csv file
3. GitHub Repository Imports – Public URL	Use this method to import git Repository. <ul style="list-style-type: none"> The repository must be public. 	<ul style="list-style-type: none"> Public URL import Imported by TAE-BC Technical Support team If application code is included in the Git Repository, the TAE-BC Security Threat Risk Assessment (STRA) process may be required, which can delay the import of the repository subject to completion of the STRA

1. File Import – File In & Out Portal

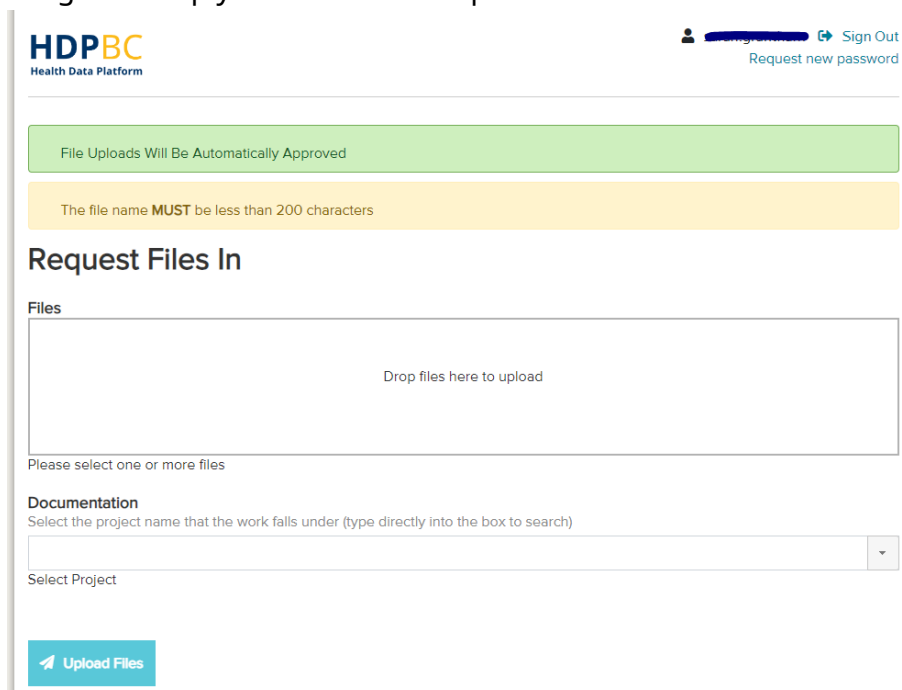
If your file does not contain sensitive personal information, is under 24MB, and does not need to be linked with other data, you may upload it yourself via the File In portal. For files over 24MB, contain sensitive personal information, or need to be linked, use [Cohort Import and Large Files](#).

Step 1

- **Using incognito browsing**, log in to the TAE-BC Desktop: <https://portal-hdpbc.healthbc.org>
- Select “New File In Request”



- Drag and drop your file in. Click Upload Files.



Step 2

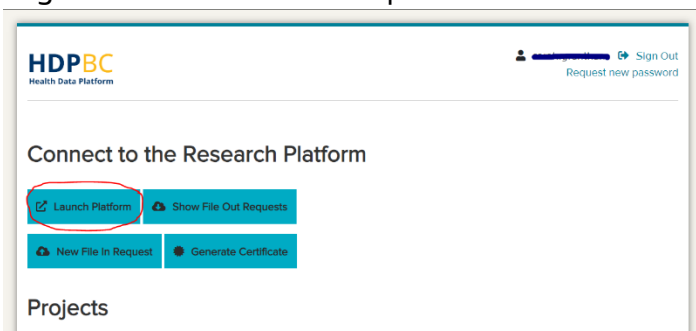
Wait for an email from the TAE-BC Support Team.

TAE-BC Support will scan the file for viruses and review the data for personal identifiers before releasing them for import to TAE-BC. You will receive an email notification after the files have been reviewed. If they've been approved for release, you can download them from within the TAE-BC Desktop.

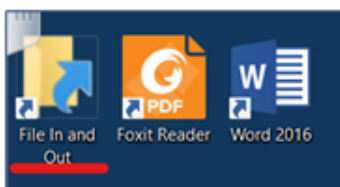
Step 3

Download the files from within the TAE-BC Desktop.

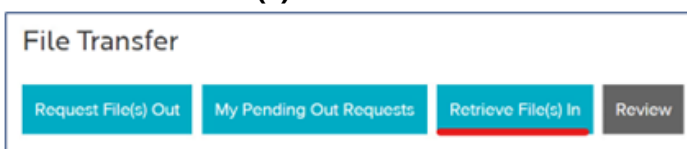
- Log in to the TAE-BC Desktop.



- Open the **File In and Out portal** on the Desktop. Log in with your TAE-BC credentials.





- Click **Retrieve File(s) In**






- You will see a list of your pending and approved file uploads. Click the view (eye) icon to access the file upload.

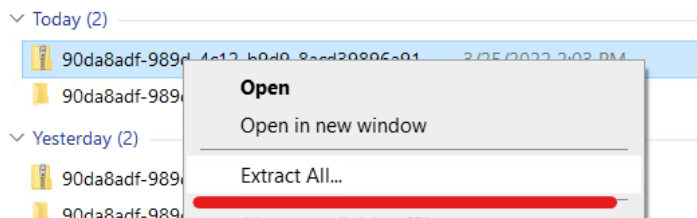
My File Uploads

Pending Requests

Posted	Project	Files	ApplicationStatus	View
02/03/22 15:43		1 (90.8 KB)	Pending	
26/11/21 09:43		1 (14.1 KB)	Pending	

Posted	Project	Files	ApplicationStatus	View
18/03/22 15:40	Testing	6 (868.6 KB)	Approved	
04/02/22 12:40	Testing	1 (95.3 KB)	Approved	
27/01/22 13:06	Testing	1 (27.2 KB)	Approved	

- Download each file individually by clicking the download icon in the request bar or download all the files at once by clicking **Download all as a ZIP**.
 - Your files will download to the "Downloads" folder
- Move the files to your P: drive to save them.
 - ! Files left in the downloads folder will not be saved once you log off from the TAE-BC Desktop**
- If you downloaded all your files a one ZIP, right click the folder, select **Extract All**, and follow the prompts.



Step 4

Access the files in your P: drive.

- Open the File Explorer
- Select **This PC**
- Open your P: drive
(Your P: drive has your name in the folder name. Files saved in the P: drive will be available only to you.)

2. Cohort Import – MOH SFTP

IMPORTANT: Applicants must have obtained approval from the provider of the data being imported into the TAE-BC to be used for linking and analysis prior to requesting to import it to the TAE-BC for their project.

Step 1: Preparing Your Cohort Import Files for TAE-BC

Before sending your Cohort Import files, it's important to take a few simple steps to ensure everything is in the right format. This helps prevent delays and allows the platform to process your data accurately and efficiently. Below are a few key things to check—such as file naming, formatting, and encoding—so your files are ready for a smooth and successful transfer.

Importantly, for each data file we anticipate an accompanying metadata file that will help guide the ingestion and encryption process.

Preparing Your Cohort Data File

Special Characters

Some special characters cannot be included in your data file

- '-' (hyphen) is reserved for separating tokens
- '.' (decimal/period) is reserved for file type delimiter
- '<' and '>' are reserved for new line characters or html tags

Column names

- Do not begin with a number
- Do not end with '_e'

To make sure your data is processed smoothly and accurately, please review the following checklist in preparing your data file for transfer:

Save each data table as its own CSV file

- If your Cohort data includes multiple tables, please save each table as its own CSV file.
- This helps keep the data organized and ensures each file can be processed correctly.

Follow the Cohort data file naming standard

Use the standard file naming format provided to keep things organized and make it easier for the platform to identify and process your files correctly.

[Project ID]-[Data object name]-[Transfer Date YYYYMMDD].csv

- **Project ID**

The project ID assigned during onboarding and is provided via email.

Examples: UP001, HDPOR001, HDPRE001, HDPAR001, etc.

- **Data Object Name**

A short description of the file content, such as the survey name. If you want to separate object name details, please use an underscore (_).

Examples:

- ioat_cohort
- survey_participants

- **Date of Transfer**

The date the files were sent to/received by TAE-BC in the format YYYYMMDD.

Example Filename

- HDPOR001-ioat_cohort-20250331.csv

Extract your data using UTF-8 encoding

When exporting your data, please ensure it is saved using UTF-8 encoding. This helps prevent any unreadable characters and ensures compatibility with the platform.

In Excel:

- Choose Save As.
- Select CSV UTF-8 (Comma delimited) (*.csv) from the file type dropdown.
- Save the file.

Important: "CSV (Comma delimited)" is not the same as "CSV UTF-8". Be sure to select the UTF-8 version to avoid character issues.

Encrypt Your Cohort Data Files Before Upload

- To protect sensitive information, all data files must be encrypted before transfer.
- Follow the instructions in Step 4: Encrypt and Compress your file(s).
- Make sure to share the decryption password with Front Counter.

Preparing your Cohort Metadata Files

To apply privacy protection rules and guarantee that data is ingested with the correct datatypes, please create one metadata file for each data file containing the following four columns: Attribute Name (field_name), Data Type (data_type), Type of Information (description), Identifier Flag (identifier_flag).

Identify Direct vs. Indirect Identifiers

To apply privacy protection rules to the data being imported to your project, the TAE-BC Technical Support team needs to know which columns are direct identifiers, and indirect identifiers. Once identified, please indicate if a given attribute is an identifier in the metadata file in the 'identifier_flag' column.

Direct Identifiers

Variables that can directly identify individuals, either alone or in combination. These variables will be encrypted to facilitate linkage of your cohort with your TAE-BC project data.

Examples: Name, Email address, IP address, home address, Personal Health Number (PHN), Social Insurance Number (SIN).

Indirect Identifiers

Variables that don't directly identify an individual but can be used to re-identify someone when combined with other data. Whether a variable counts as an indirect identifier depends on the nature of the data. These variables may be altered to reduce re-identification risk.

Examples: Date of Birth (DOB), Sex, Patient Residence City, First three digits of postal code (FSA)

Removal of Non-linkable PI

Important: Ensure that provider and/or patient names have been excluded from your file prior to transferring.

Example: Populated Metadata Information Table

Metadata File 1 Example

HDPOR001-ioat_cohort-20250331-meta.csv

field_name	data_type	description	Identifier_flag
PHN	Varchar(50)	Personal Health Number	Direct Identifier
Name	Varchar(50)	First and Last Name	Direct Identifier
Diag_Code	int	Code representing diagnosis	
FSA_location	Varchar(250)	First three digits of postal code	Indirect Identifier
Home_address	Varchar(250)	Home address	Direct Identifier
attend_time	float	Time spend on patient	
ICD_10_Code	int	ICD 10 Code	

Metadata File 2 Example

HDPOR001-survey_participants-20250331-meta.csv

field_name	data_type	description	Identifier_flag
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PHN	Varchar(50)	Personal Health Number	Direct Identifier
Mother Name	Varchar(50)	First and Last Name of Mother	Direct Identifier
Diag_Code	int	Code representing diagnosis	

Final Checklist for Metadata Files

Save Each Metadata Table as Its Own CSV File

If your Cohort data includes multiple tables, please provide a metadata file for each table as its own CSV file. This helps keep the metadata organized and ensures each file can be processed correctly.

Follow the Metadata file naming standard

Use the standard file naming format keep things organized and make processing easier:

[Project ID]-[Data object name]-[Transfer Date YYYYMMDD]-meta.csv

- **Project ID**
The project ID is assigned during onboarding and provided via email.
Examples: UP001, HDPOR001, HDPRE001, HDPAR001, etc.
- **Data Object Name**
A short description of the file content, such as the survey name. If you want to separate object name details, please use an underscore (_).
Examples:
 - ioat_cohort
 - survey_participants
- **Date of Transfer**
The date the files were sent to/received by TAE-BC in the format YYYYMMDD.
Example: 20250401.
- **Meta(data) Content Type**
'-meta' suffix at the end of the file ensures that the metadata can be easily distinguished from the data file.

Example filenames:

HDPOR001-ioat_cohort_20250331-meta.csv

HDPOR001-survey_participants-20250331-meta.csv

Step 2: Notify HDPBC Front Counter of Readiness

When your data is ready to transfer, email HDPBC Front Counter (MOHAnalytics@gov.bc.ca). Include your:

<ul style="list-style-type: none"> • Project name • Principal applicant name • Project number • File names (to be transferred) • SFTP/technical contact name 	<ul style="list-style-type: none"> • SFTP/technical contact phone number* • SFTP/technical contact email address
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The HDPBC Front Counter will review your request and send it on to the TAE-BC Support Team, who will support you in completing your import via MOH SFTP*.

*The MOH SFTP team will contact you via this phone number; please ensure you provide a number you can be reached at.

Step 3: Download Encryption Software

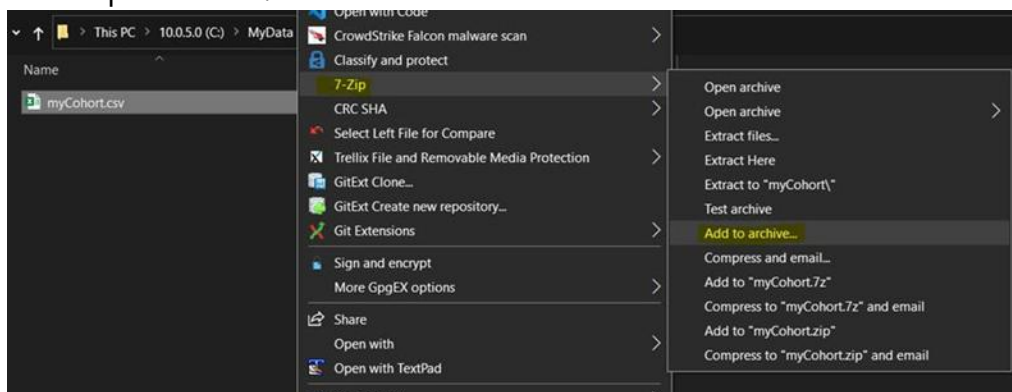
Download [7-Zip](#) to encrypt and compress your file.

Step 4: Encrypt and Compress your file(s)

Note: Only data files are required to be encrypted and compressed. Metadata can be encrypted and compressed but are not required to do so.

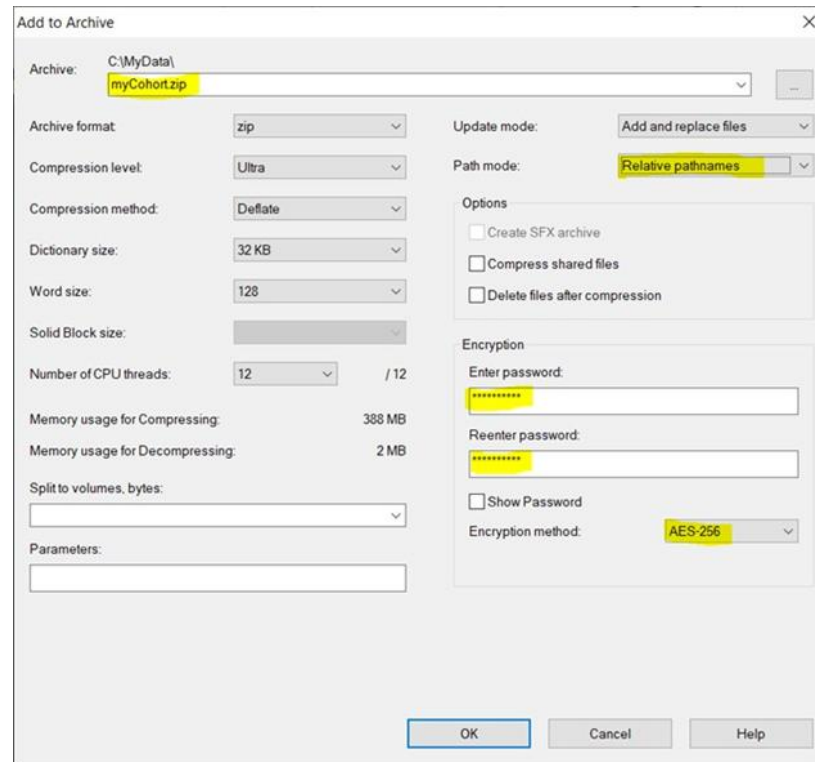
Ensure your data is extracted with UTF-8 encoding to prevent the generation or inclusion of special characters that are not accepted by the TAE-BC.

- Ensure you have [7-Zip](#) downloaded to encrypt and compress your file(s). Once downloaded, you can move to the next step.
- Right-click on the file you want to compress and select 7-Zip > Add to archive... from the 7-zip submenu.

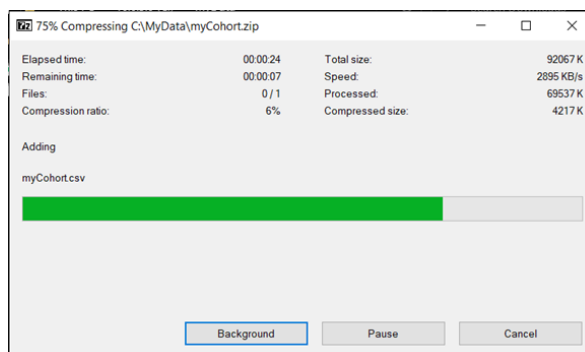


- Ensure the following details are entered as shown in screenshot below:
- Enter the file name

- Next to Path mode ensure Relative pathnames is selected
- Under the Encryption section:
 - Enter a strong password under Enter Password and Re-enter Password and save it for future use. This password should be used for all the files uploaded to MOH SFTP until otherwise notified by the TAE-BC team
 - For Encryption method, select AES-256
 - Leave the rest of the fields as default



- Press OK and wait for the file to compress



- Once the file is compressed, you will see a new zip file. This is the file you will upload to the MOH SFTP, in addition to your metadata information and control file(s).

When complete, you will have a new zip file. This is the file you will upload to MOH SFTP, in addition to your metadata information .csv file.

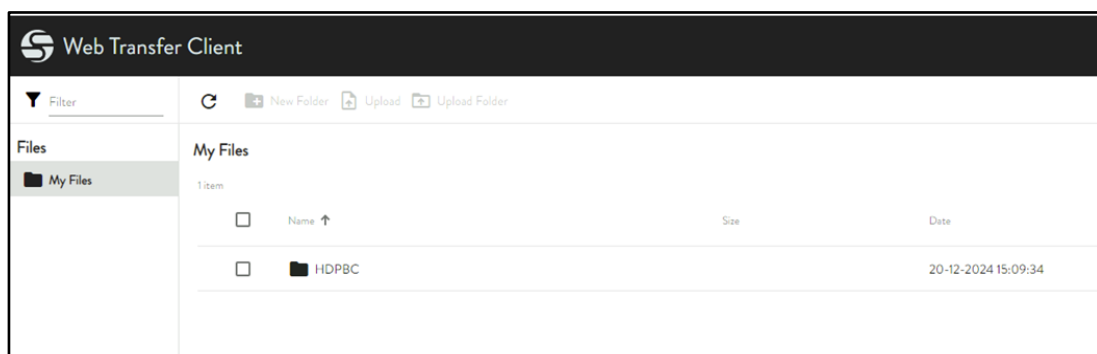
Step 5: Upload your data and metadata information files to SFTP

The MOH SFTP Web Client allows for a simplified upload experience as compared to uploading to SFTP server. This method **does not require an SSH key, an HDPBC credential nor an SFTP client**. A browser is all that is required.

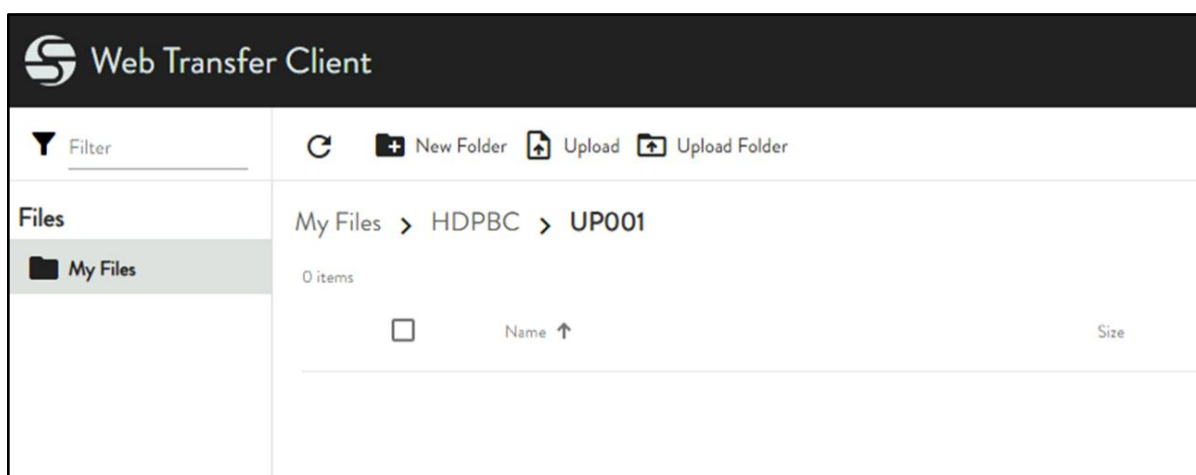
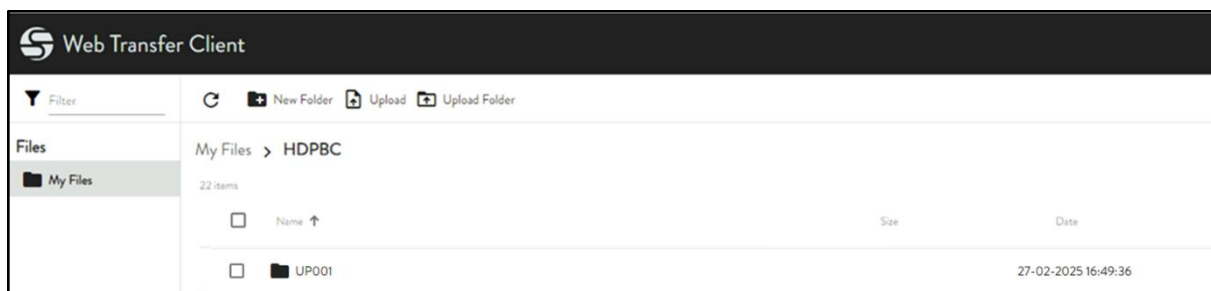
1. MOH NETREQUEST will email you a User ID and call you to provide the password. You will need that to complete the following steps.
2. Navigate to the MOH SFTP Web Client and enter the **Username** and **Password** provided.

<https://webftpsvcs.hlth.gov.bc.ca>

3. Once logged in, you will arrive on the Web Transfer Client home page, as seen in the screenshot below.

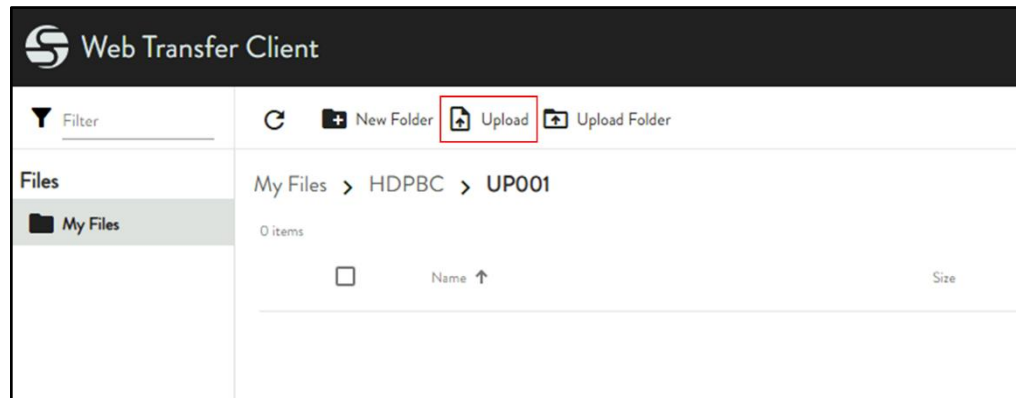


4. Click on **HDPBC** in the left-hand navigation pane and then choose a Project folder. Most users will only see one folder that corresponds to their TAE-BC Project. In the example below we chose **UP001**.

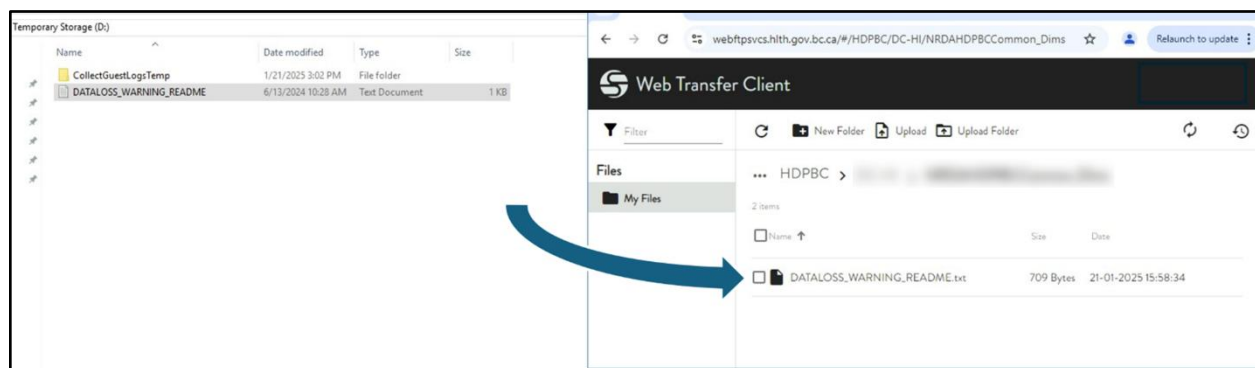


Reminder: Now we are going to upload the file(s). To upload, your file must first be compressed and **ENCRYPTED WITH MINIMUM AES-256 or RSA-2048 BEFORE UPLOADING.**

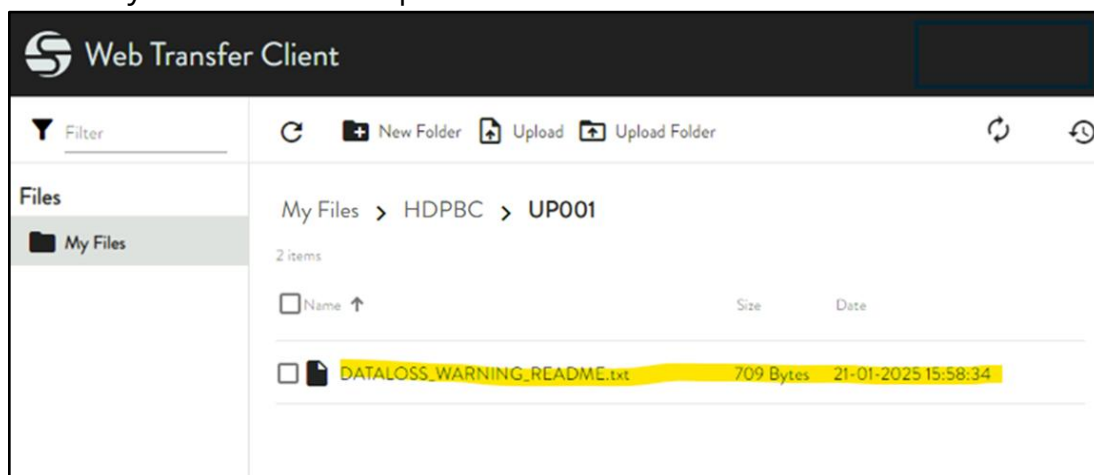
5. Once in the project folder, you manually upload the files or click and drag your files.
 - a. To manually upload your files, select the Upload (uploads a file) button to start uploading your files. If you've compressed your files into one zip, you'll likely use the Upload button.



- b. Alternatively, you can select the files from a Windows Explorer window and drag your files to the MOH SFTP as seen in the screenshot below.



6. Confirm your file has been uploaded



7. Notify the HDPBC Front Counter (MOHAnalytics@gov.bc.ca) that the data and metadata information files have been uploaded for the TAE-BC Technical Support team to pick up—***please include your encryption password (refer to Step 4 above) for file retrieval.***

3. GitHub Repository Imports – Public URL

PLEASE NOTE: If application code is included in the Git Repository, the HDPBC Security Threat Risk Assessment (STRA) process may be required, which can delay the import of the repository subject to completion of the STRA.

Step 1

Send the following request details to HDPBC Front Counter (MOHAnalytics@gov.bc.ca):

- Project name
- Principal applicant name
- Project number
- Git Repository information
 - Repository name
 - Location (public URL)

Step 2

Wait for an email confirmation that your Git Repository import has been completed.