



Provider Guide to the Document Vault

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Introduction to the Document Vault

The Document Vault provides your organization with a secure digital filing cabinet for important organizational documentation. The Document Vault also allows you to upload required documents necessary to obtain and maintain eligibility to conduct business with the City of New York. The Document Vault enables direct and secure transmission of documents to the HHS Accelerator Team, City Agencies, other funders and Client and Community-based Services Providers.

The Document Vault provides:

- A secure and paperless system
- Document accessibility controls
- Easy access to documents required to do business with the City and other funders
- Automated system reminders for expiration of critical documents.

By default, when a document is uploaded to the Document Vault, it is private—only members of your organization who have been granted access to your organization’s HHS Accelerator Account can view those documents. However, the Document Vault makes it easy for users to grant permission to other organizations (Foundations, City Agencies, etc.) to view documents.

Please remember to obtain all necessary approval before uploading any of your organization’s documents to the Document Vault. Any material that may be deemed offensive or inappropriate is not to be stored in the Document Vault.

Key Documents to Maintain in your Document Vault

The following are examples of documents that may prove useful to store in your Document Vault. Document names followed by an asterisk (*) are required by the HHS Accelerator Application process.

Corporate Structure Documents

- Annual Report
- Board List (including officers and length of term)*
- Certificate of Incorporation*
- Certificate of Insurance Form
- Certificate of Occupancy or Place of Assembly Permit
- Chief Executive Officer (CEO) Resume or equivalent*
- Corporate By-Laws*
- IRS Determination Letter*
- Lease or Rental Agreement
- Organizational Chart*
- Reference Letters
- W9.

Financial Documents

- A-133, OMB Single Audit Report
- Board Approved Organization Budget
- CHAR500, Annual Filing for Charitable Organizations*
- Independent Audit or Certified Public Account (CPA) Review Report*
- IRS Form 990.

Policy Documents

- Fiscal Manual
- Policy and Procedures Manual
- Human Resources or Personnel Policy Manual.

Document Vault Navigation

You must log into your HHS Accelerator Account to view and maintain documents your organization wants to store and share with other organizations. Click the “**Document Vault**” button at the top of the page to access your Document Vault.

Text Size: A A A

Organization Information **Document Vault** Applications Procurements Financials

Welcome: James Polk, R4 Test Org 12

Document Vault

Manage documents loaded by your organization

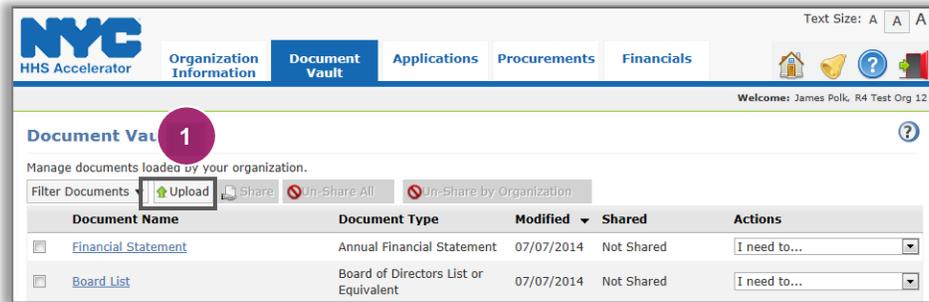
Filter Documents

Document Name	Document Type	Modified	Shared	Actions
<input type="checkbox"/> Financial Statement	Annual Financial Statement	07/07/2014	Not Shared	I need to...
<input type="checkbox"/> Board List	Board of Directors List or Equivalent	07/07/2014	Not Shared	I need to...
<input checked="" type="checkbox"/> Certificate of Incorporation	Certificate of Incorporation or equivalent	07/07/2014	Not Shared	I need to...
<input type="checkbox"/> CEO Resume	Chief Executive Officer (CEO) Resume or Equivalent	07/07/2014	Not Shared	I need to...

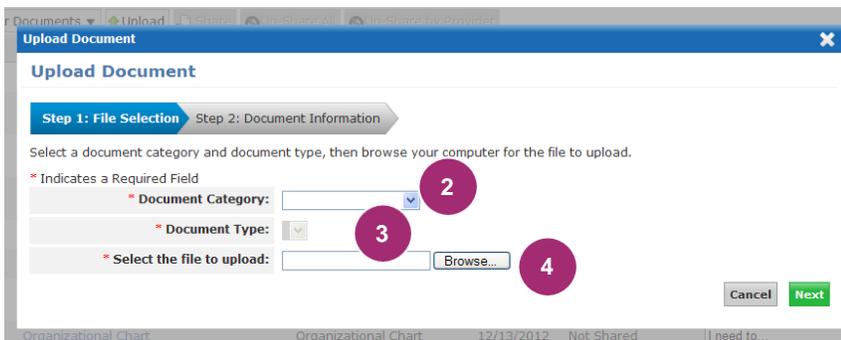
a	Document Management Tabs.
b	Displays if the document has been shared with HHS Accelerator, another organization or City Agency.
c	The Action drop-down includes View Document, View Information, and Delete.
d	Click the checkbox next to an individual document name to share only that specific document.

Uploading a New Document

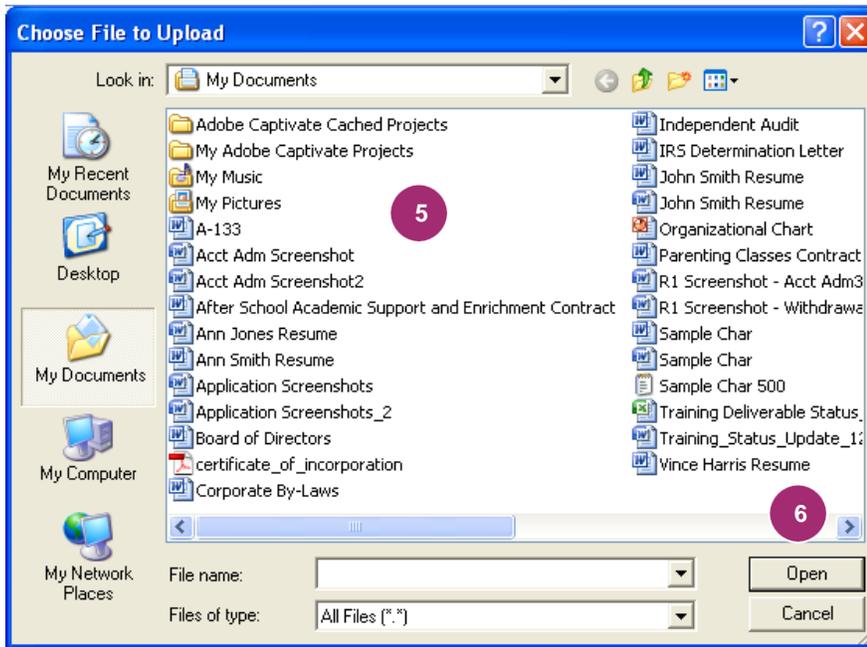
You must be logged into your account to upload a new document to your Document Vault. Once logged in, click the **“Document Vault”** button at the top of the page to access your Document Vault.



1. Click the **“Upload”** tab to upload a new document.



2. Select the **“Document Category.”**
3. Select the **“Document Type.”**
4. Click **“Browse”** to locate the document to upload.



5. Select the document you wish to upload.

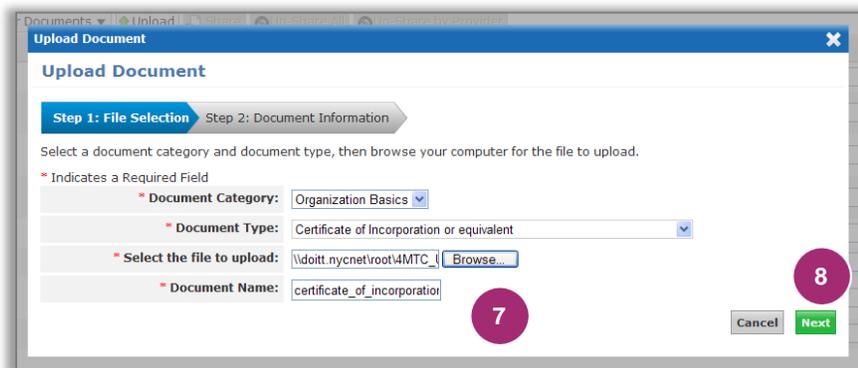
6. Click “Open.”

The selected file’s location will populate the ‘Select the file to upload’ field.

7. Enter the desired “Document Name.”

The “Document Name” field will default to the document’s file name.

8. Click “Next.”



Upload Document

Step 1: File Selection Step 2: Document Information

Please enter required Document Information, if applicable, and confirm the existing information. Note: if this is replacing an existing document, any sharing privileges will be applied to this document.

* Indicates a Required Field

Document Category: Organization Basics

Document Type: Certificate of Incorporation or equivalent

Document Name: Certificate of Incorporation

File Type: PDF

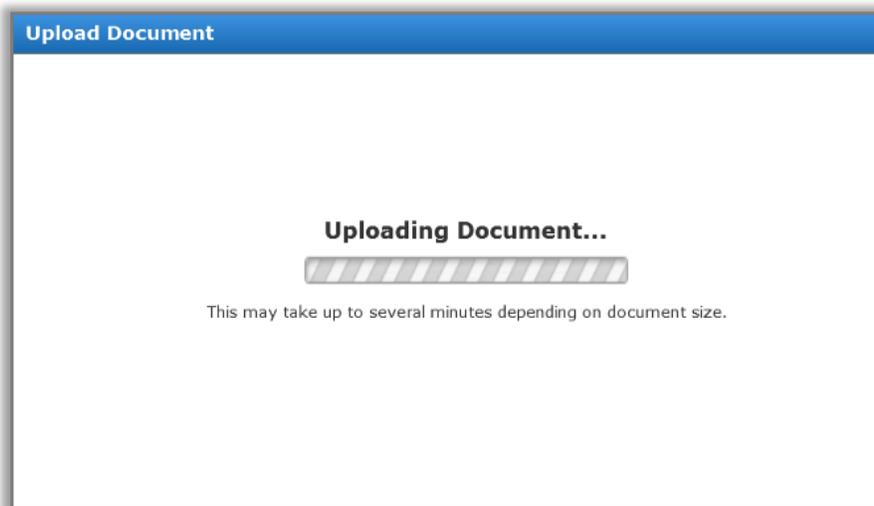
* **Effective Date(mm/dd/yyyy):**

9 10

9. Click the calendar icon and select the document's **“Effective Date.”**

Where an effective date is not applicable, please enter the date the document was officially approved by your organization for sharing externally.

10. Click **“Upload Document.”**



The system begins to process your request and upload your document. The time required for your document's upload will vary based on the size of the file and the speed of your internet connection and may take a few minutes.



It is important that you create unique file names for new files uploaded to your Document Vault, as newly uploaded documents with duplicate file names will overwrite preexisting documents.

Upload Confirmation

Once the upload is complete, you will be redirected to your Document Vault and receive system confirmation of your successful upload.

The screenshot shows the NYC HHS Accelerator Document Vault interface. At the top, there is a navigation bar with the NYC HHS Accelerator logo and several menu items: Organization Information, Document Vault (highlighted), Applications, Procurements, and Financials. A user greeting "Welcome: James Polk, R4 Test Org 12" is visible on the right. Below the navigation bar, the "Document Vault" section is titled, and a green confirmation message states: "The file was successfully uploaded to your Document Vault." Below this message, there are several action buttons: Filter Documents, Upload, Share, Un-Share All, and Un-Share by Organization. A table lists the documents in the vault:

Document Name	Document Type	Modified	Shared	Actions
A-133 2014	A-133	08/21/2014	Not Shared	I need to...
Financial Statement	Annual Financial Statement	07/07/2014	Not Shared	I need to...

Filtering your Documents

Your Document Vault can be filtered to quickly and easily locate documents. Populate the fields in the Filter Documents function to narrow down the results of your search. You may search by more specific details; Document Category, Document Type or by more general details; Provider/Funder, NYC Agency and period of modification.

The screenshot displays the NYC HHS Accelerator Document Vault interface. At the top, there is a navigation bar with the NYC HHS Accelerator logo on the left and several menu items: Organization Information, Document Vault (highlighted), Applications, Procurements, and Financials. On the right side of the navigation bar, there are icons for home, help, and user profile, along with a text size selector (A A A). Below the navigation bar, a welcome message reads "Welcome: James Polk, R4 Test Org 12".

The main content area is titled "Document Vault" and includes a sub-header "Manage documents loaded by your organization." A green notification bar states "The file was successfully uploaded to your Document Vault." Below this, there is a toolbar with buttons for "Filter Documents" (highlighted), "Upload", "Share", "Un-Share All", and "Un-Share by Organization".

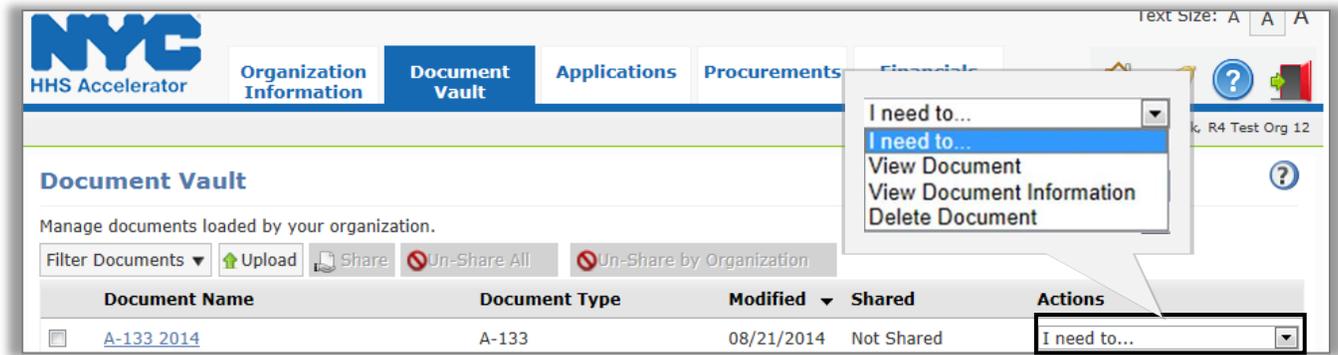
A "Filter Documents" dialog box is open, featuring the following fields:

- Document Category: A dropdown menu.
- Document Type: A dropdown menu.
- Modified from: A date input field with a calendar icon.
- Modified To: A date input field with a calendar icon.

At the bottom of the dialog box, there are "Clear Filters" and "Filter" buttons.

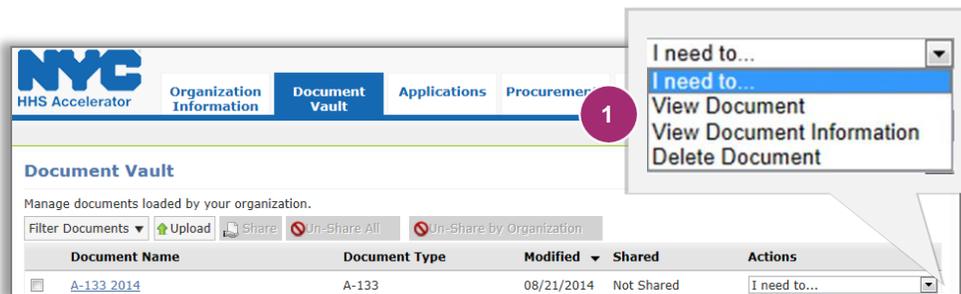
Document Vault Actions

Document actions are selected from the 'Actions' column; and can only be applied to the document in the line item. From this window, you are able to preview your documents and the documents' information, as well as delete documents.



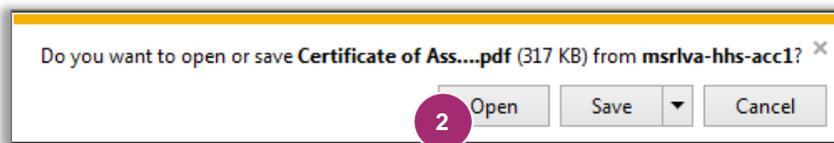
Viewing Documents

Your Document Vault documents can be downloaded so you can view them on your computer.



1. Select **“View Document”** from the Actions column of the document you wish to view.

*Or, click the **“Document Name”** hyperlink from your Document Vault.*

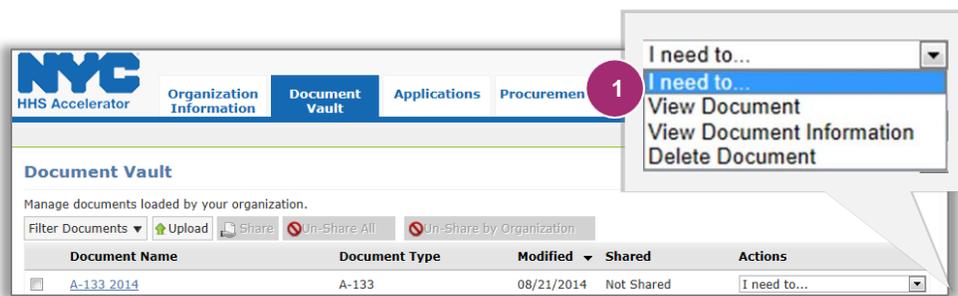


2. Click **“Open”** and the document will open on your screen.

Deleting Documents from your Document Vault

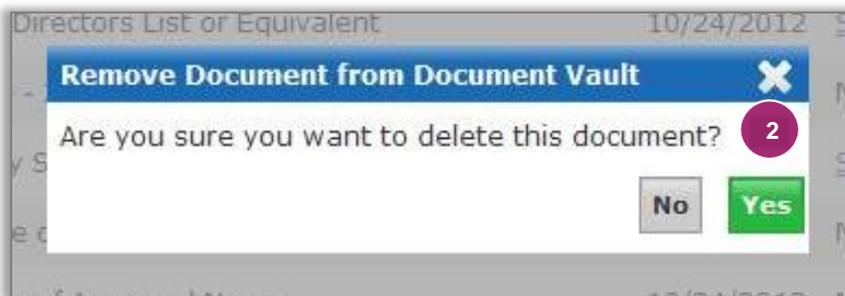
Once a file is deleted from your Document Vault, it is permanently erased and cannot be recovered.

Deleting a document from the vault impacts your entire organization. Should you choose to delete a file from your Document Vault; it is advised that you always save a copy for record-keeping purposes. Please note that you cannot delete a document that is part of an application, proposal, budget, invoice or modification that has been submitted. Documents may be uploaded in different parts of the HHS Accelerator System, for example, associated with your organization's HHS Accelerator Applications, and proposal, budget and invoice submission. These documents will appear in your vault and cannot be deleted.



1. Select **“Delete Document”** from the actions dropdown of the document you wish to delete.

A window will pop up requesting that you confirm your request to delete the document.

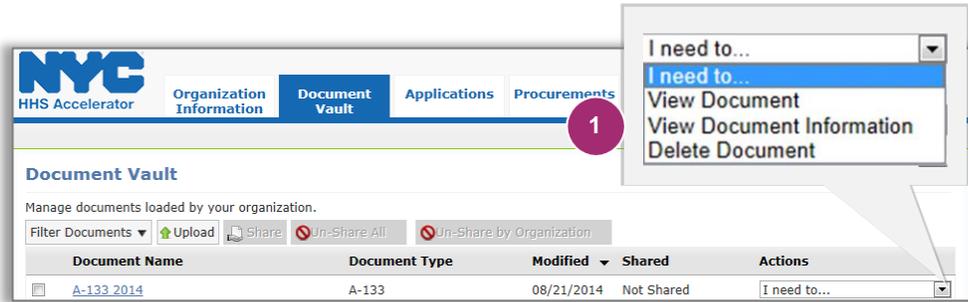


2. Click **“Yes”** to delete your document.

The document will then be permanently removed from your Document Vault.

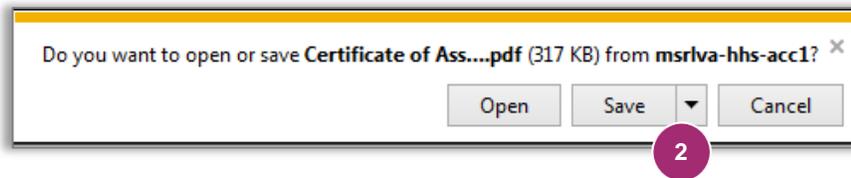
Downloading Documents from your Document Vault

Documents found in your Document Vault can be downloaded to your Organization’s computer.



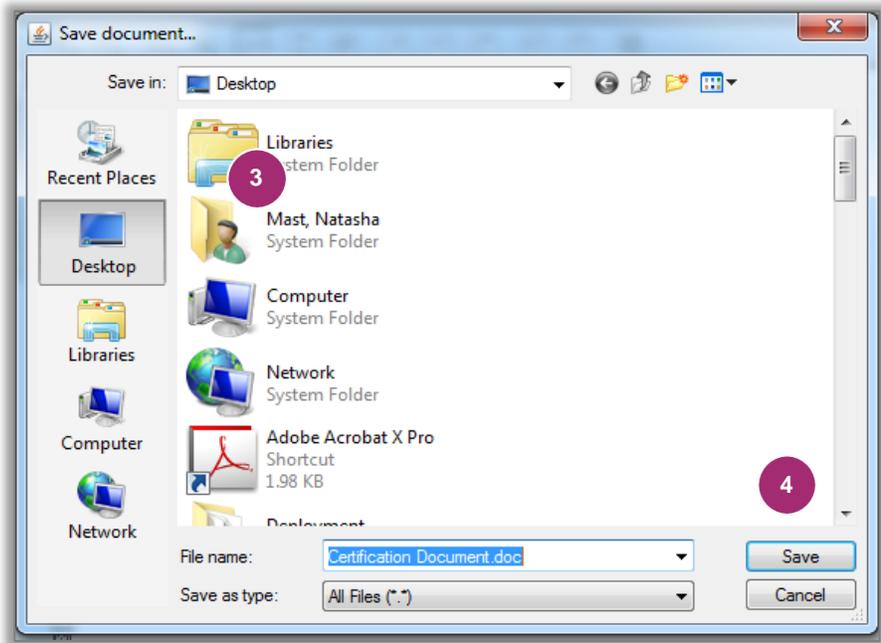
1. Select “**View Document**” from the actions dropdown of the document you wish to download.

A pop-up window will open on the bottom of your screen displaying the downloading options



2. Click the  icon, next to the “**Save As.**”

Do not change the document name until after you have saved it to your desktop.

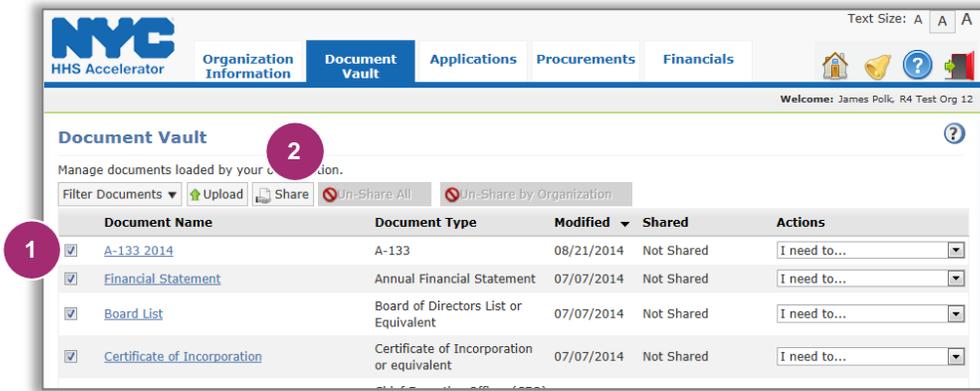


3. Select the location for your document.
4. Click **“Save.”**

Sharing Documents from your Document Vault

There are many reasons that an organization might want to share a document. Organizations can share promotional information (flyers, brochures, or capability statements) to promote their services. Organizations can also share organizational charts, reports or a list of the Board of Directors to allow Agencies, or potential partners a view into their organization’s structure or governance. Your organization’s profile is a part of your public identity visible to users with whom you share documents, so your profile should accurately reflect your organizational goals and capabilities.

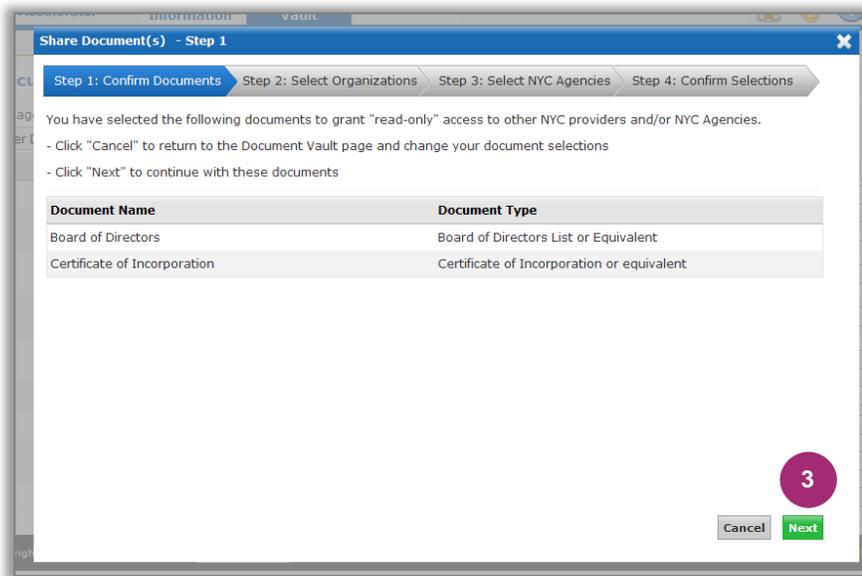
Navigate to the Document Vault by clicking on the “Document Vault” tab.



1. Select the document(s) you wish to share by clicking the check box(es) to the left of the document(s).

Where possible, we recommend that you share multiple documents at one time.

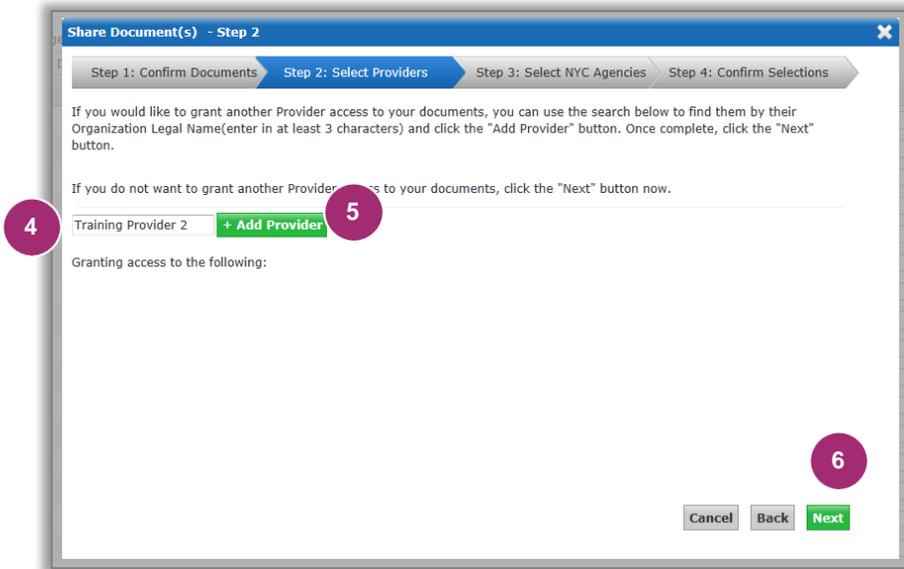
2. Click the “Share” tab.



A pop-up will open requesting that you confirm the documents you have chosen to share.

3. Click “Next.”

Now you're able to select the providers you'd like to share your documents with. If you **do not** wish to share with other Organizations, click **"Next."**



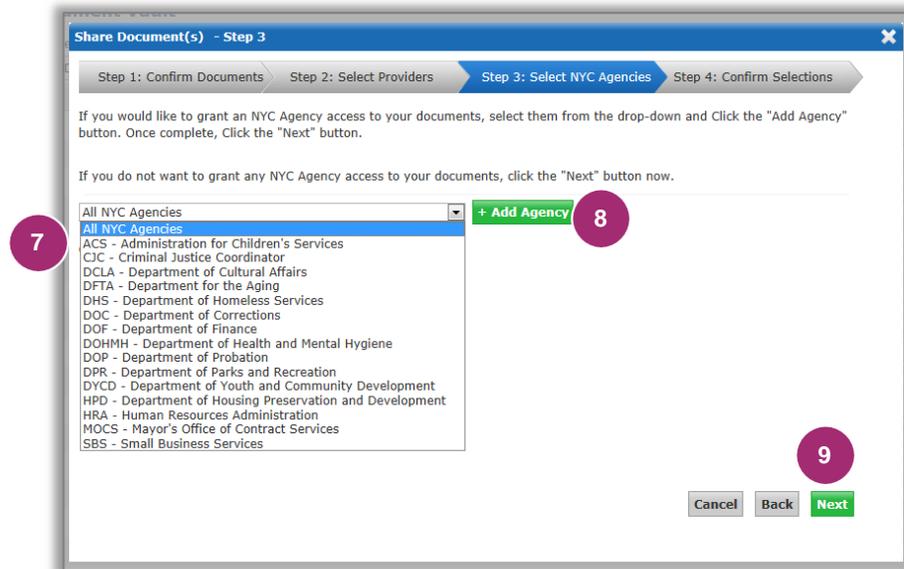
4. Type the name of the provider you'd like to share your document with.

5. Click **"Add Provider."**

If you wish to add more than one, you must add each additional provider separately.

6. Click **"Next."**

If you **do not** wish to grant access to Agencies, click **"Next."**

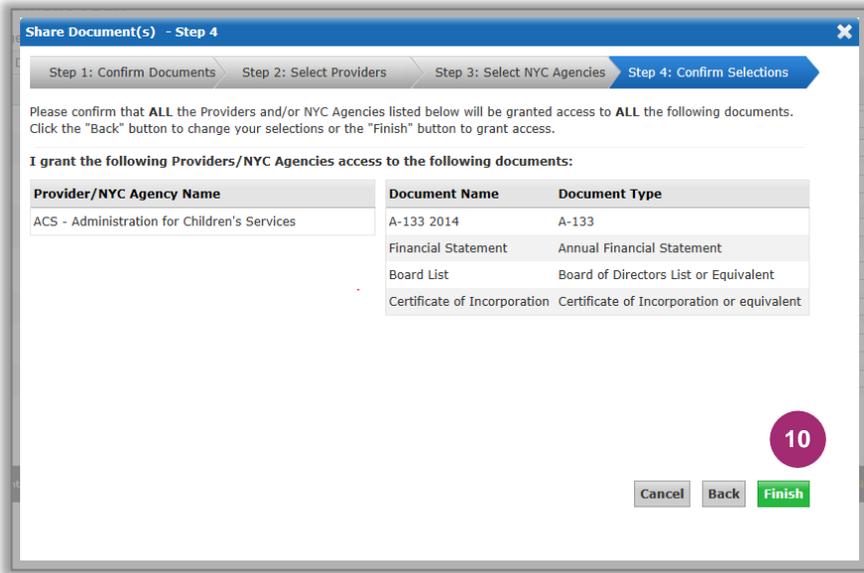


7. Select the Agency that you would like to share your document with.

8. Click **"Add Agency."**

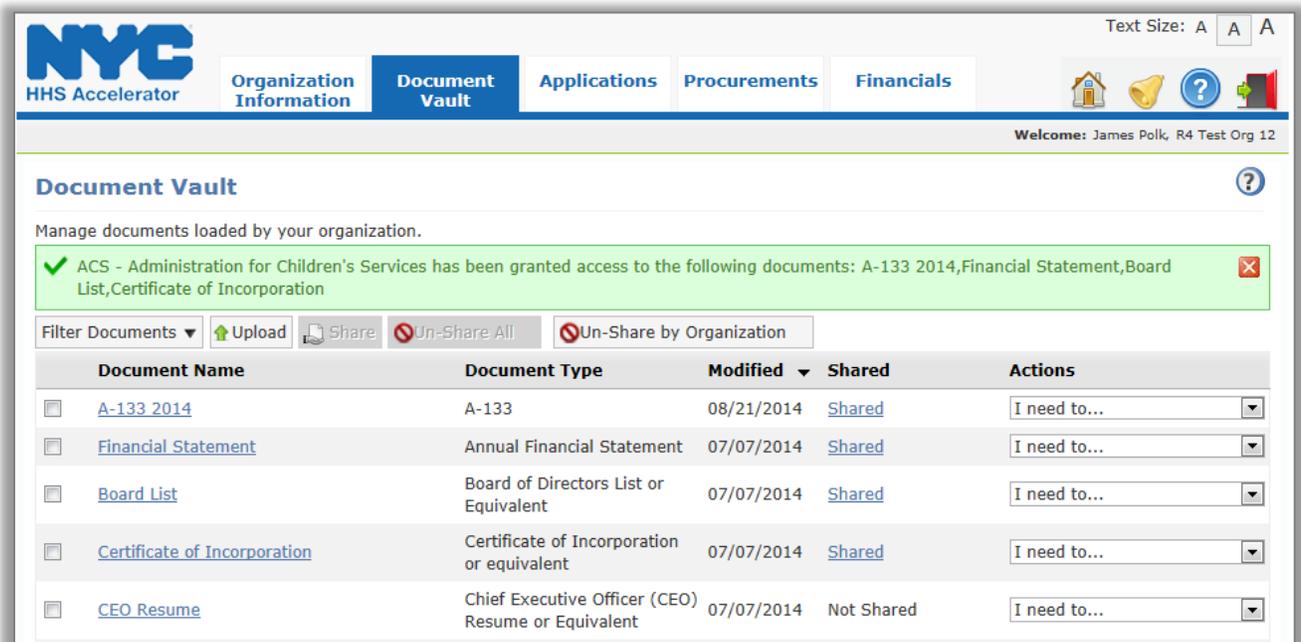
If you wish to add more than one, you must add each additional Agency separately.

9. Click **"Next."**



10. Confirm your selections, and then click **“Finish.”**

The system will then direct you back to your Document Vault to confirm the updated status of your documents. The status of the documents you selected will now be **“Shared.”**



Un-Sharing your Documents

In the same way that documents can be shared, they can be un-shared and privileges to view a document can be removed. There are two tabs in particular that govern un-sharing:

Document Vault

Manage documents loaded by your organization.

Filter Documents

Document Name	Document Type	Modified	Shared	Actions
A-133 2014	A-133	08/21/2014	Shared	I need to...
Financial Statement	Annual Financial Statement	07/07/2014	Shared	I need to...
Board List	Board of Directors List or Equivalent	07/07/2014	Shared	I need to...
Certificate of Incorporation	Certificate of Incorporation or equivalent	07/07/2014	Shared	I need to...
CEO Resume	Chief Executive Officer (CEO) Resume or Equivalent	07/07/2014	Not Shared	I need to...

- | | |
|---|--|
| a | Click here to revoke all organizations' access to the selected document(s). |
| b | Click here to revoke one or more organizations' access to every document shared with them. |

Un-Sharing a Document

Document Vault

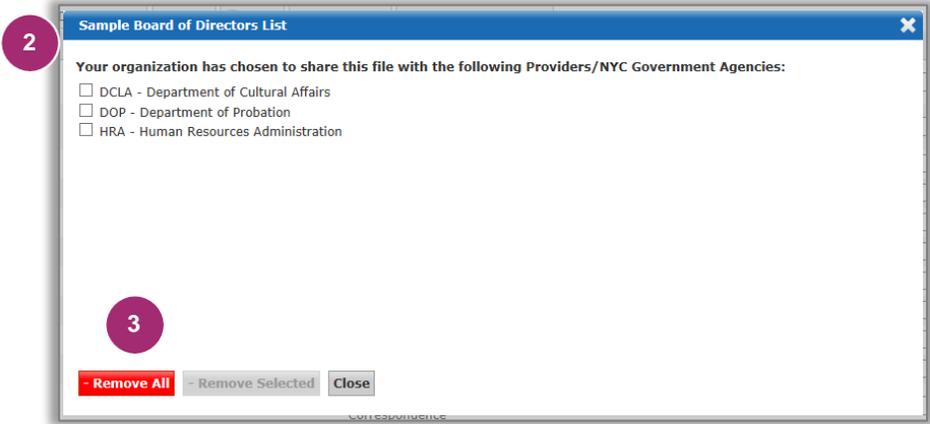
Manage documents loaded by your organization.

Filter Documents

Document Name	Document Type	Modified	Shared	Actions
A-133 2014	A-133	08/21/2014	Shared	I need to...
Financial Statement	Annual Financial Statement	07/07/2014	Shared	I need to...
Board List	Board of Directors List or Equivalent	07/07/2014	Shared	I need to...

1. Click the document's **“Shared”** hyperlink from the document's Shared column.

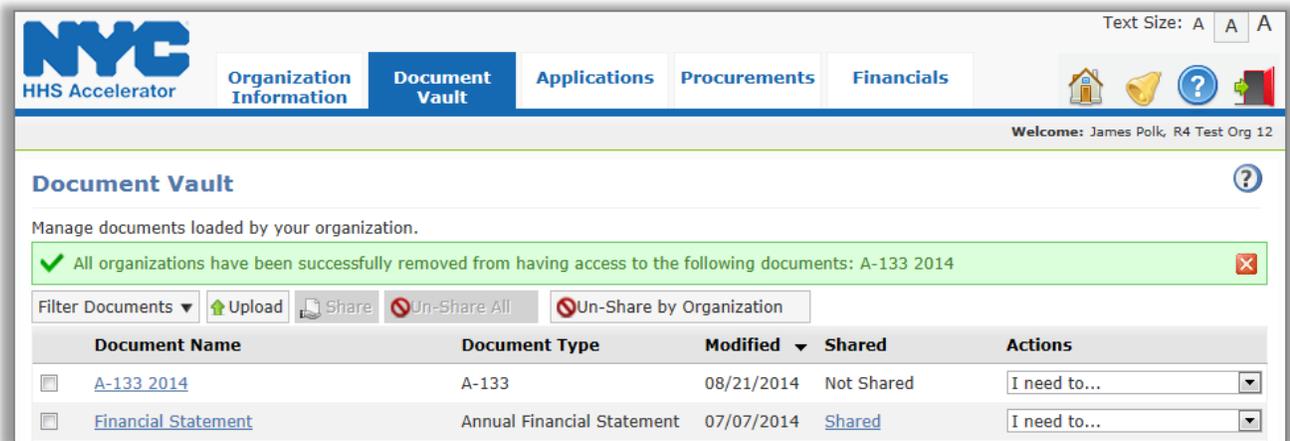
*If there is no hyperlink, the document has **not** been shared.*



A pop-up will open.

2. Select the *organization(s)* you wish to remove.
3. Click **“Remove Selected”** or, if appropriate, **“Remove All.”**

The system will then direct you back to your Document Vault to confirm the updated status of your documents.

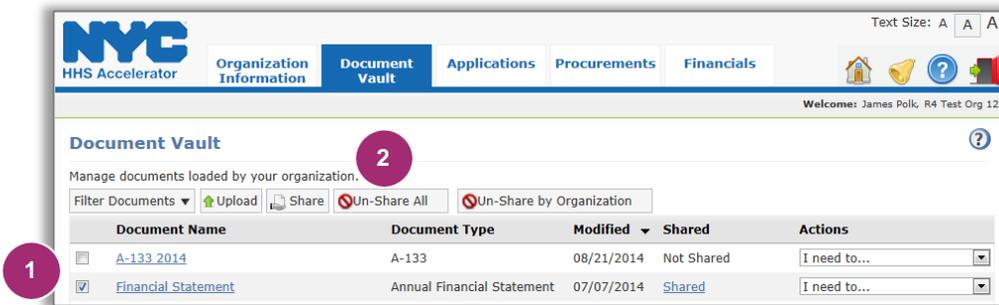


Un-Sharing Multiple Documents

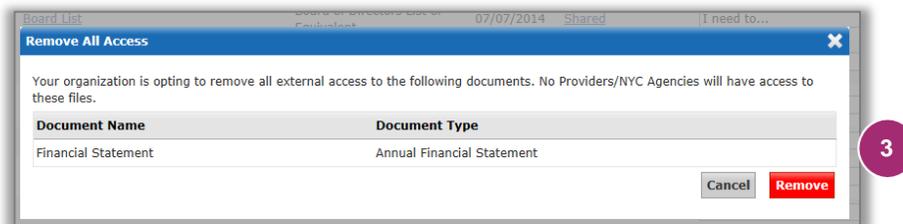
You may need to remove access to a group of documents. In this case, you do not have to un-share access one document at a time. You can change permissions for multiple documents simultaneously, and you can un-share that access across the board by employing “Un-Share All”, or you can remove access by using “Un-Share by Provider.”

Un-Share your Document(s) with All Organizations

You may need to replace a series of documents that you have already shared, because they are outdated. To un-share all external access to multiple documents, navigate to the Document Vault by clicking the Document Vault button at the top of the screen:



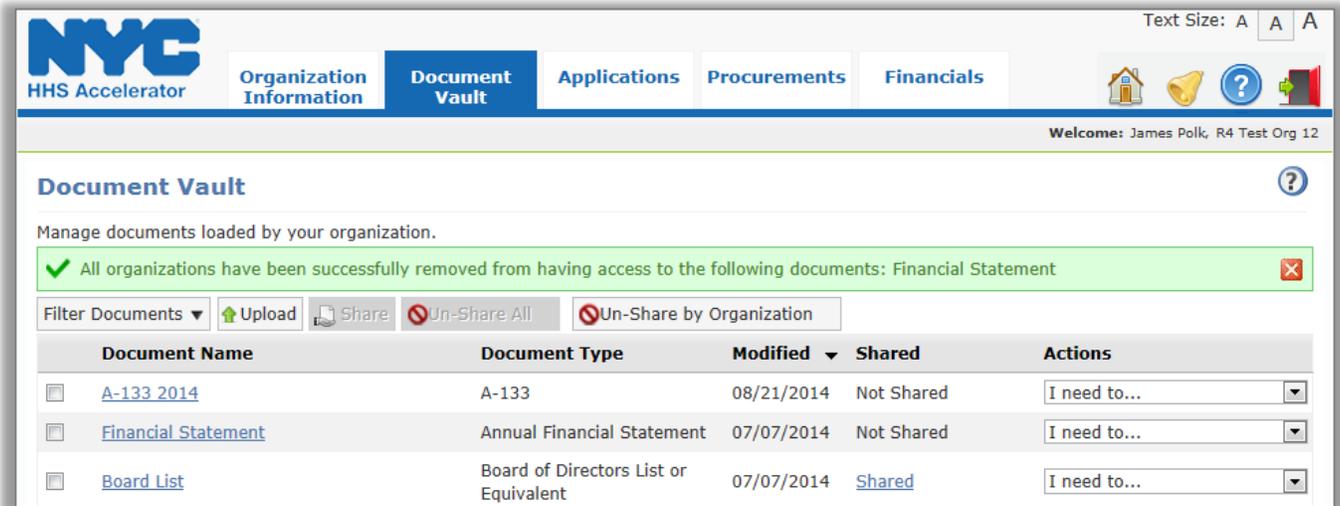
1. Select the **document(s)** you wish to un-share by clicking the check boxes to their left.
2. Click the “**Un-Share All**” tab.



A pop-up will prompt you to review the documents you have selected.

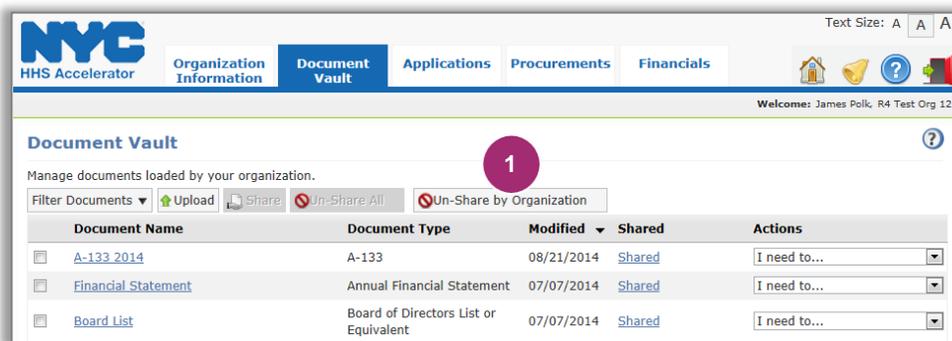
3. Click “**Remove.**”

The system will then direct you back to your Document Vault to confirm the updated access privileges to your documents.

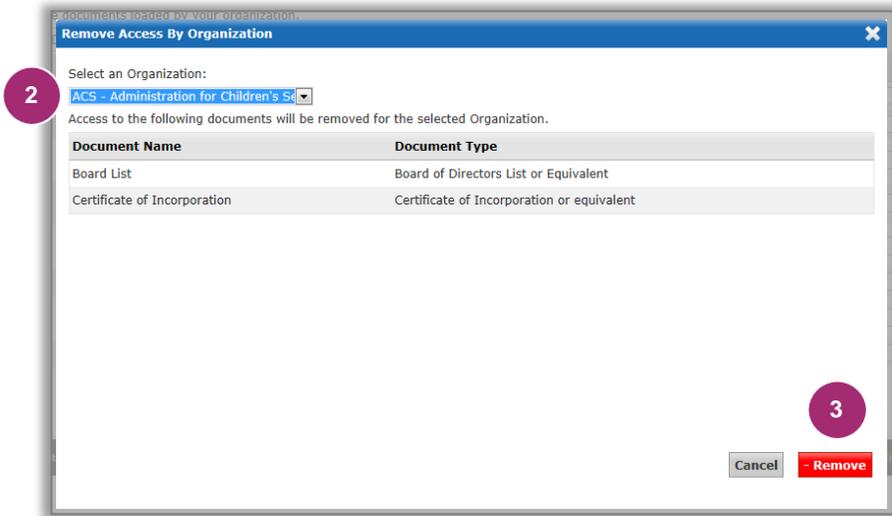


Un-Share by Organization

You may also un-share documents by Organization. This option allows you to remove permissions for all documents shared with a specific organization.



1. Select the **“Un-Share by Organization”** tab.



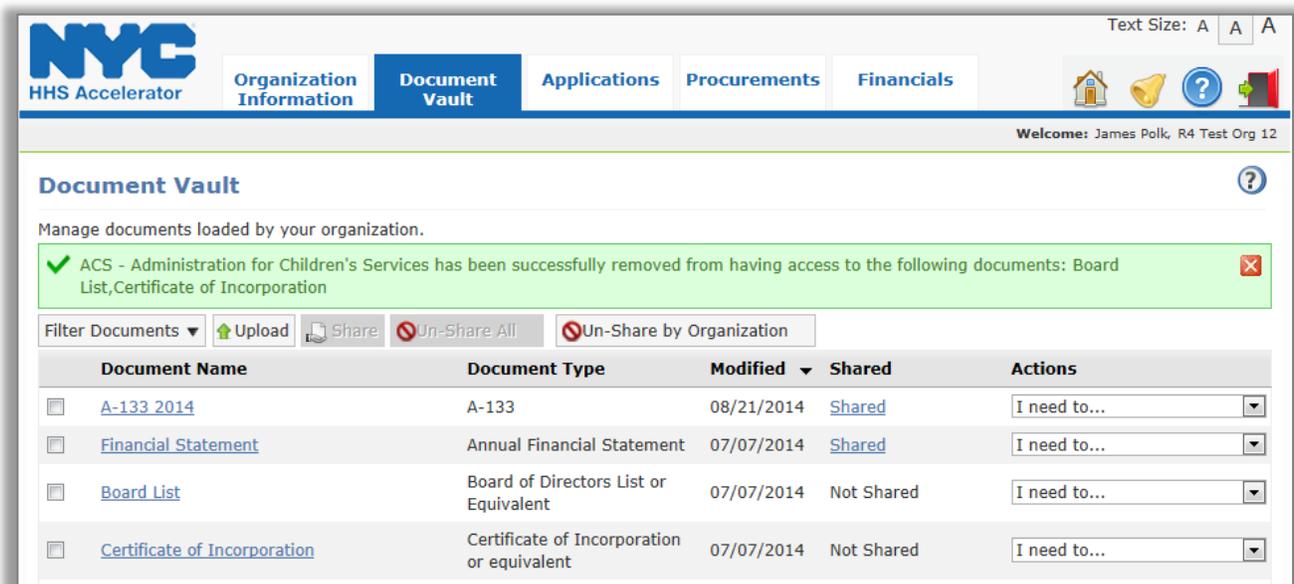
A pop-up will open.

2. Select the **Organization** whose viewing access you have chosen to remove from the drop-down menu.

All documents listed on the pop-up will be unshared with the Provider or Agency Selected.

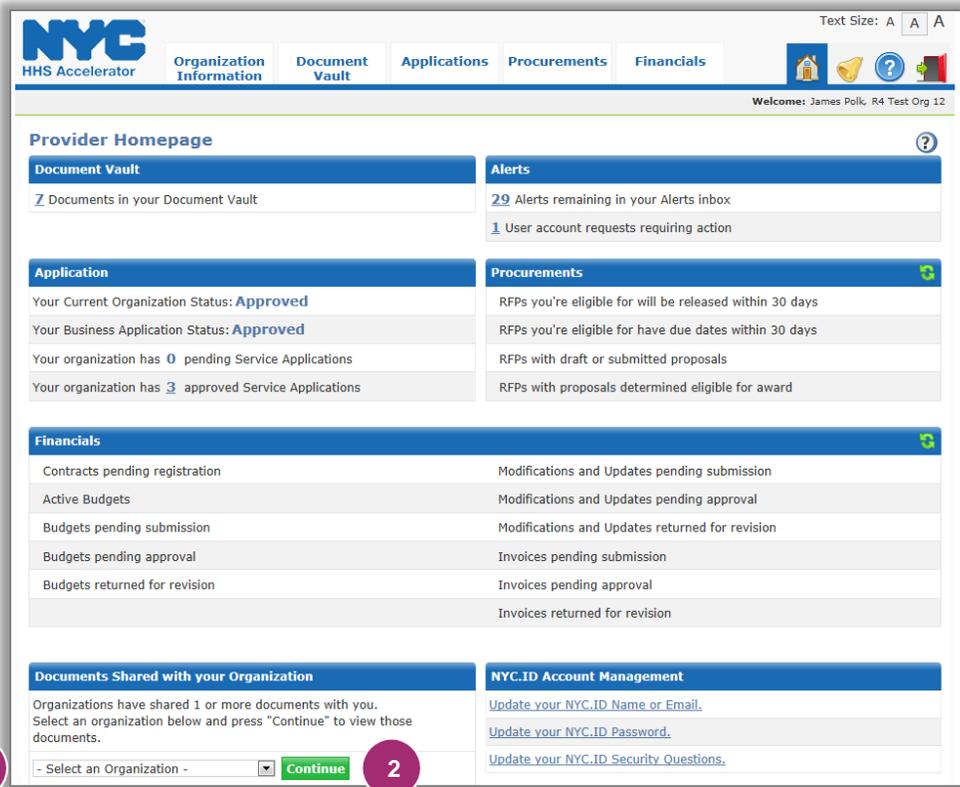
3. Click **“Remove.”**

The system will then direct you back to your Document Vault to confirm that the documents have been un-shared.

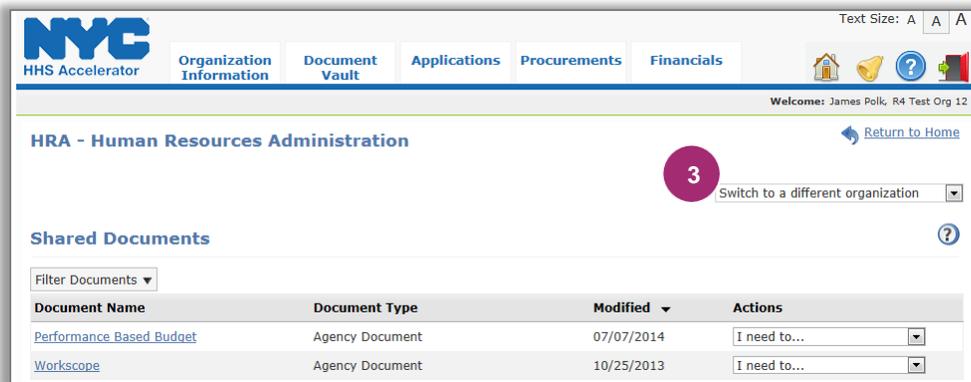


Accessing Externally Shared Documents

NYC Agencies and other organizations with HHS Accelerator accounts can share documents with your organization as well. You can view those documents directly from your organization’s homepage. If a document has been shared with your organization, in the section labeled “Documents shared with your Organization” you will see a message that “Organizations have shared 1 or more documents with you.”



1. Click the drop down menu to choose an organization.
2. Click “Continue.”



A screen will open displaying basic information on the organization you selected.

3. Click the “Shared Documents” button above the Organization Basics.

HRA - Human Resources Administration [Return to Home](#)

Switch to a different organization

Shared Documents

Filter Documents

Document Name	Document Type	Modified	Actions
Performance Based Budget	Agency Document	07/07/2014	I need to...
Workscope	Agency Document	10/25/2013	I need to...

- From the desired documents' Actions drop down, select **"View Document."**

A new browser window will open displaying the document.



If you feel that a document has been shared with you in error, please contact the organization that shared the document.