Provider Guide to the Document Vault

HHS Accelerator

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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
- Document search options include: Name, Date, Type, Shared and Linked documents
- 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 by using the sharing feature.

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.

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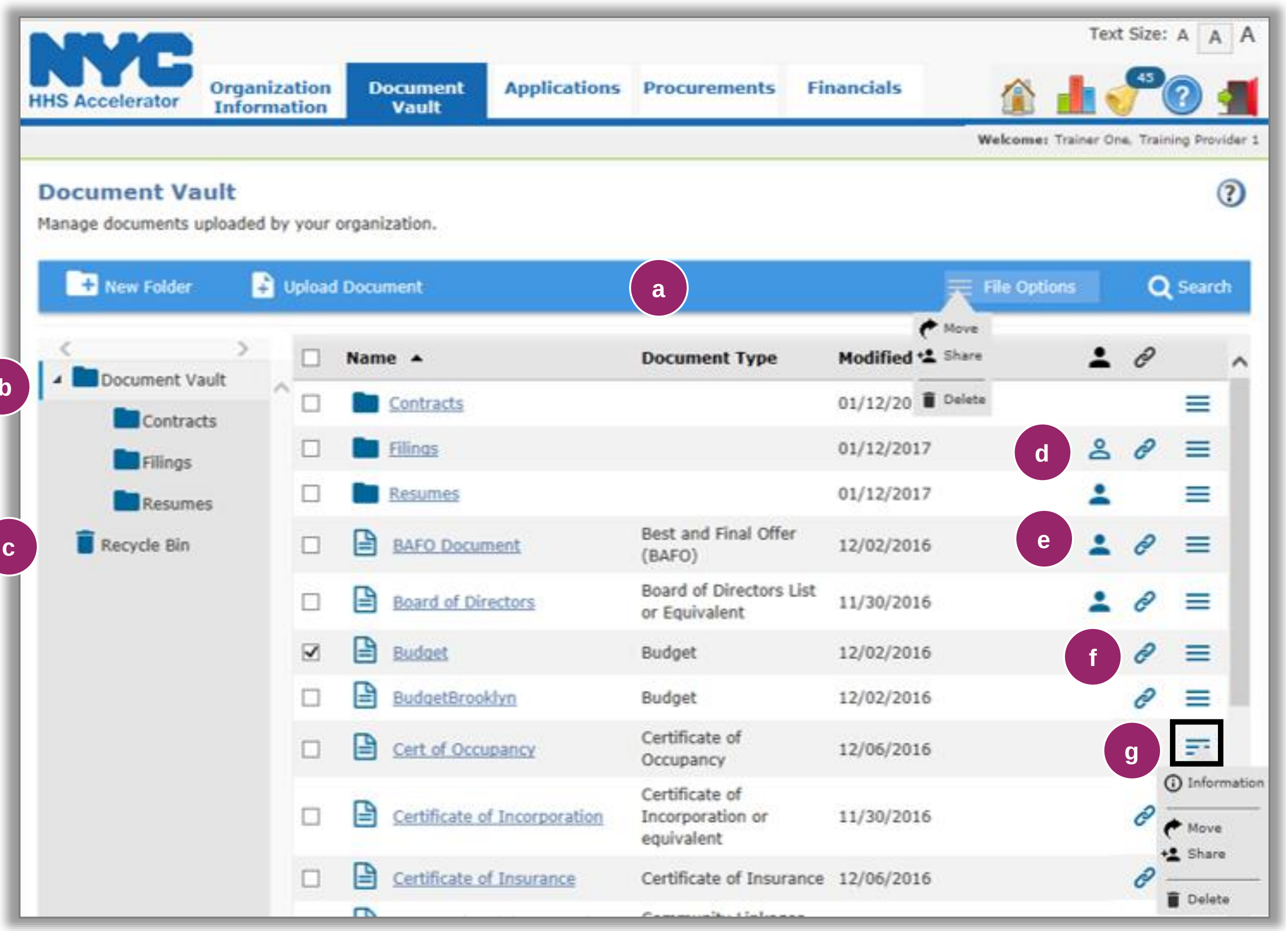
Document Vault Navigation

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

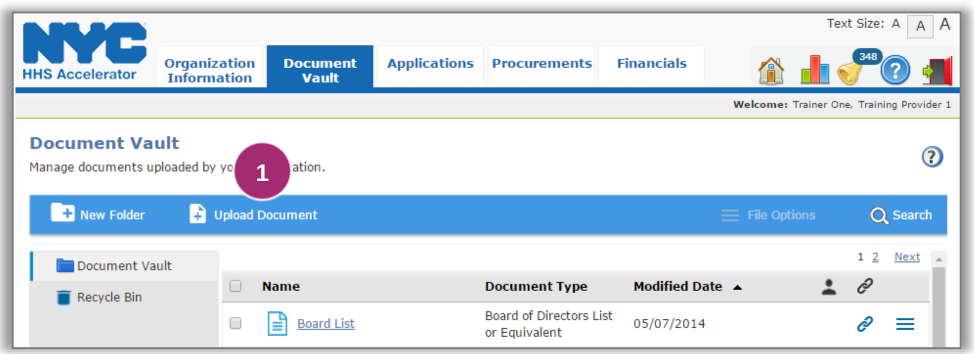


a	Use the Folder and Document Management bar to create a **New Folder**, to **Upload Documents**, to utilize the **File Options** functionality (to move, share, unshare, or delete documents/folders) and to **Search** within your Document Vault.
b	The **folder structure** created by your organization is displayed.
c	The **Recycle Bin** is where your organization manages deleted documents.
d	The **blue outlined (no fill) Sharing icon** indicates a document/folder *within* this folder have been shared. The folder itself has not been shared.
e	The **solid blue Sharing icon** indicates a document/folder has been shared with an Agency or another Organization.
f	The **Linkage icon** indicates a document/folder is linked to one or more system tasks. Linked files cannot be deleted.
g	The **Filter Options icon** next to each document can be used to view Document Information, to move, to share or to delete a document.

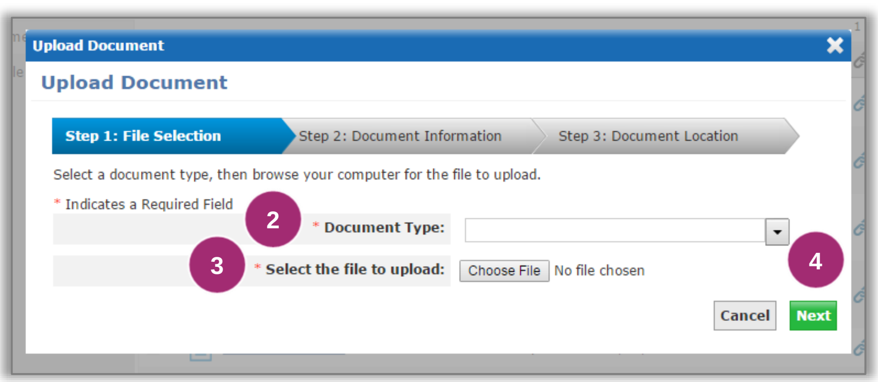
Uploading a New Document

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

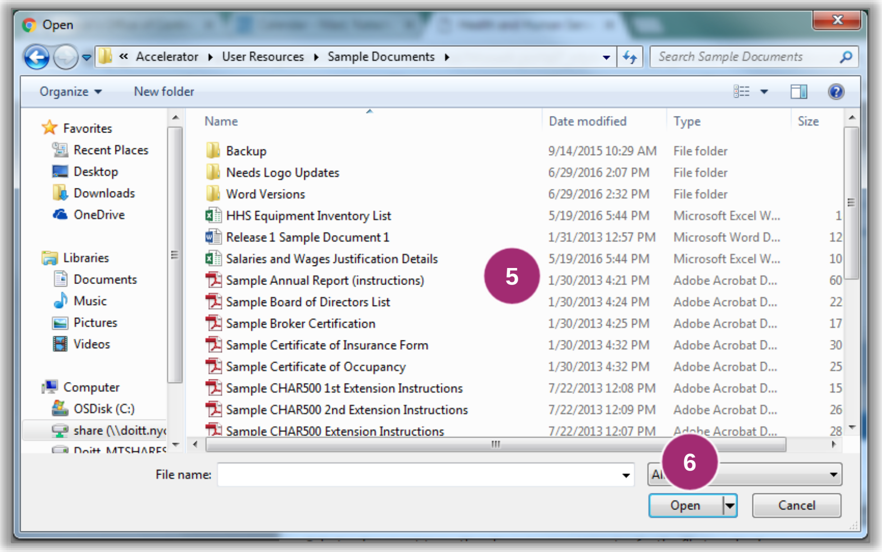
It is important that you create unique file names for new files uploaded to your Document Vault, as newly uploaded documents with duplicate file names will overwrite preexisting documents.



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

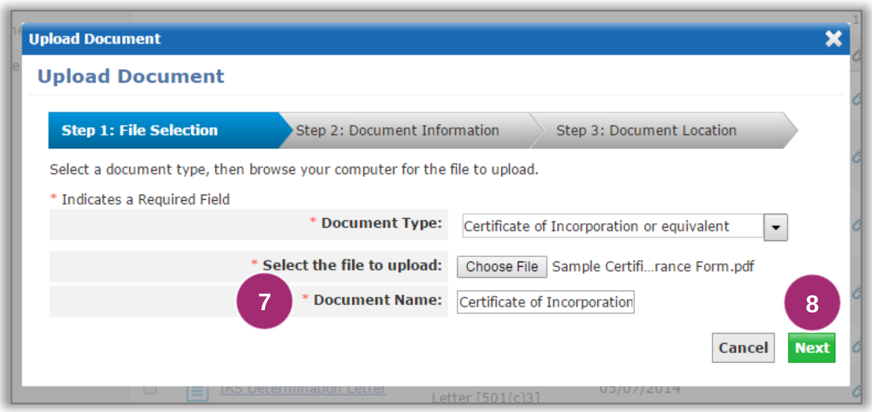


2. Select **“Document Type”** from the drop down.
3. Click **“Choose File”** to locate the document to upload.
4. Click “**Next**.”



5. Select the document you wish to upload.

6. Click **"Open."**

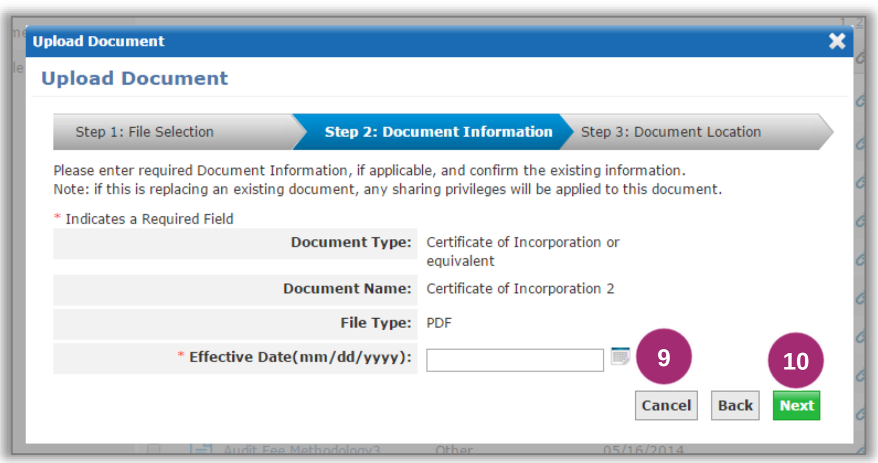


The selected file's location will populate the "Select the file to upload" field.

7. Enter the desired **"Document Name."**

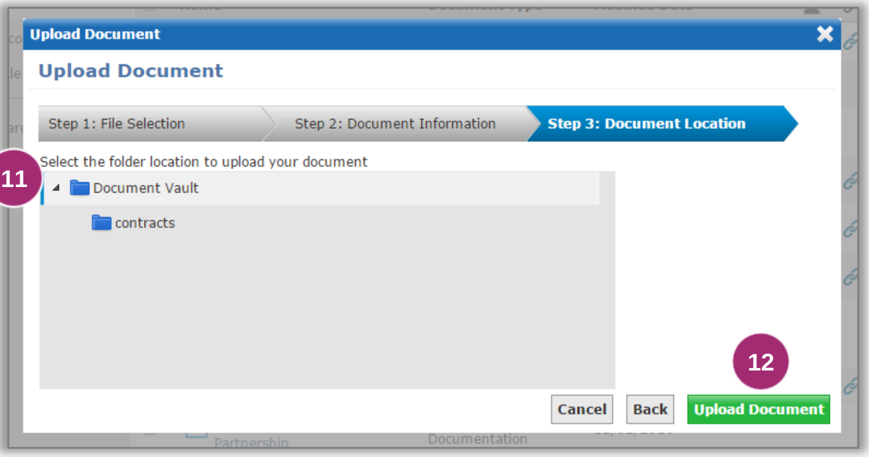
The "Document Name" field will default to the document's file name.

8. Click **"Next."**



9. If required, click the calendar icon to select the **"Effective Date."**

10. Click **"Next."**



11. Select the folder location to upload your document.

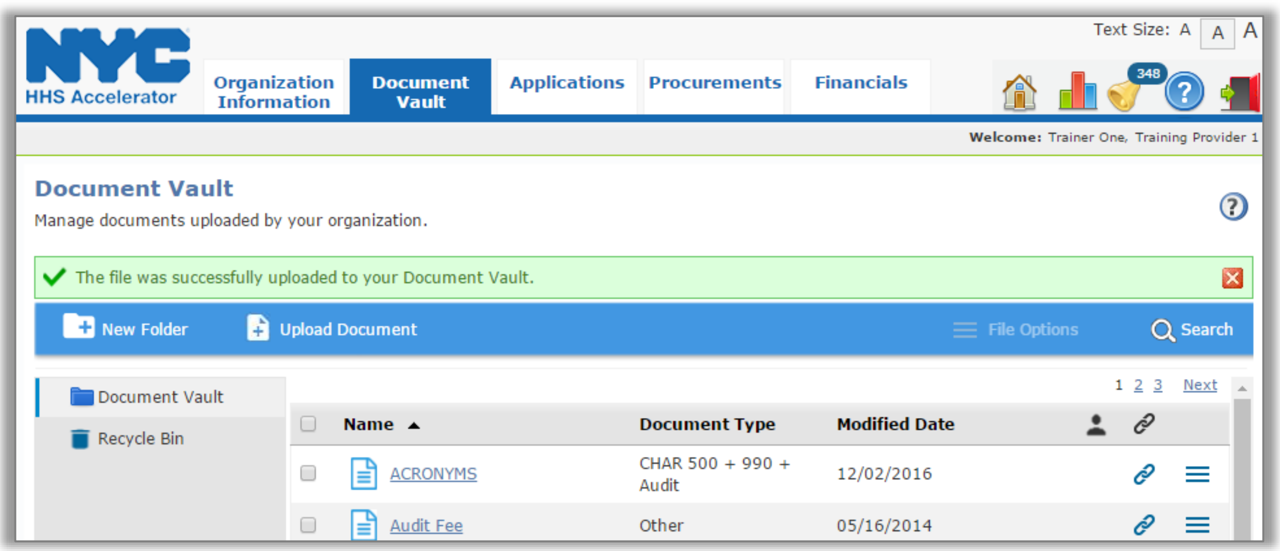
Documents can still be moved to any other folder at a later stage.

12. Click **"Upload Document."**

**The maximum acceptable file size is 12 MB.*

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.

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

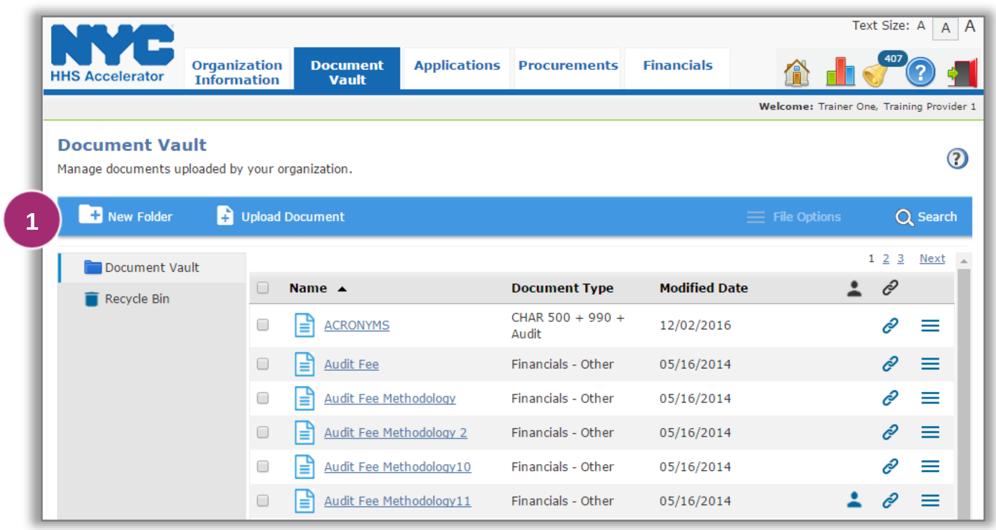


Utilizing Folders to Organize your Documents

As usage of HHS Accelerator increases for your organization, the number of documents in your Document Vault has increased accordingly. The HHS Accelerator System has been enhanced to provide your organization with the ability to create folders to organize these documents. The Document Vault is a shared resource for your entire organization, so if a user creates a folder, it will impact every user for your organization. We recommend you discuss the ideal folder structure with leadership at your organization before implementing any changes.

Creating a Folder

If your Document Vault stores a large number of files, you may want to create folders and give them descriptive names.



1. Click the "**New Folder"** button located on the blue Document and Folder Management bar.

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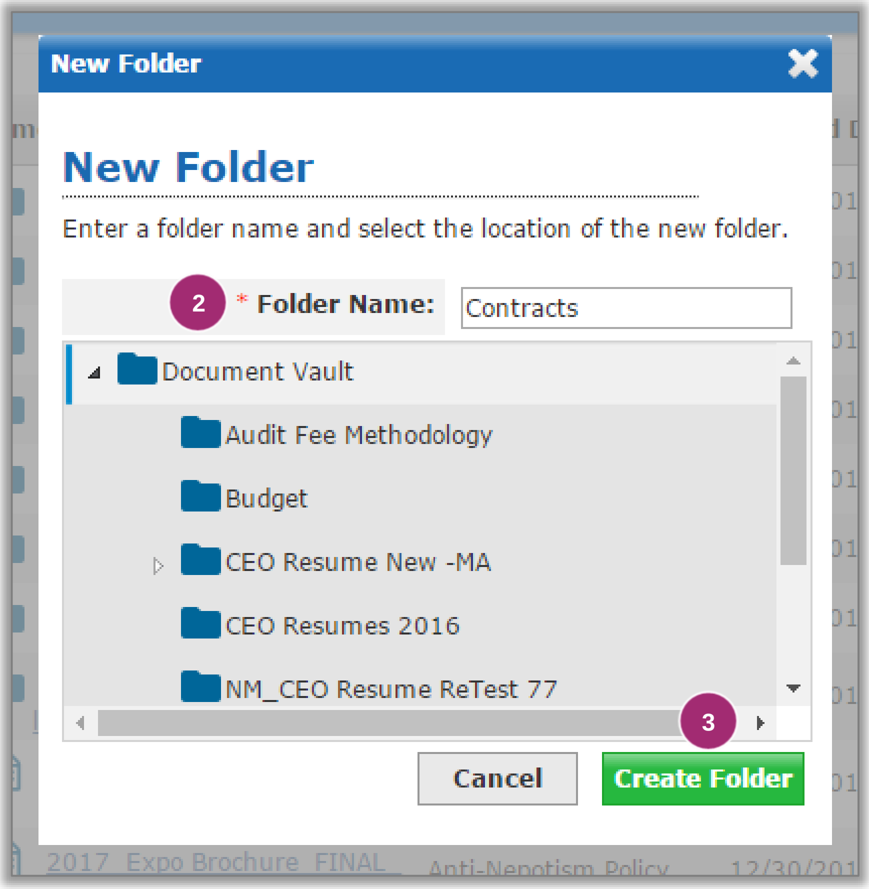


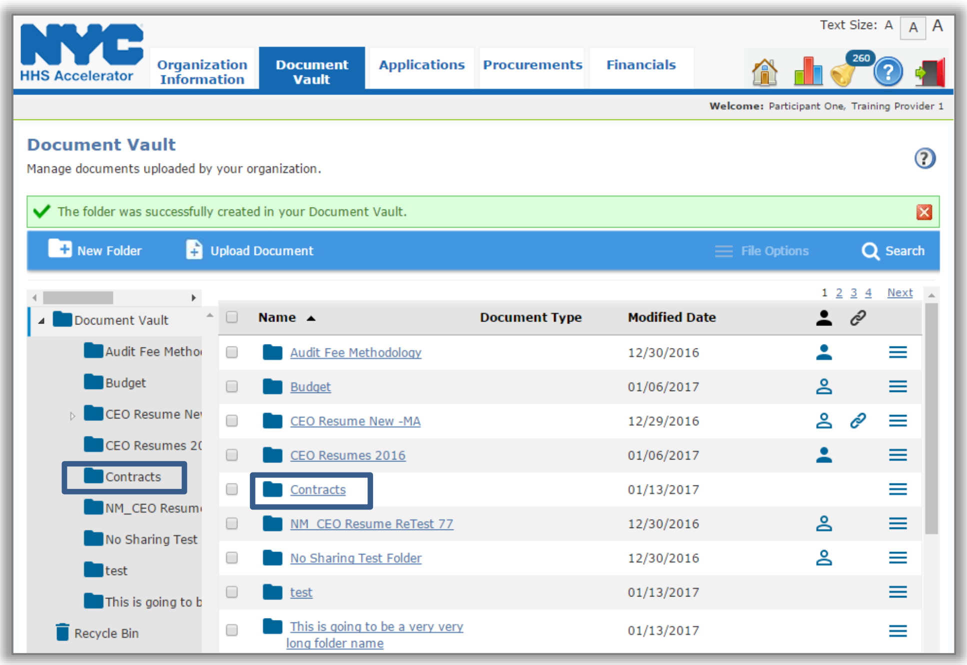
A window will pop up requesting that you enter a folder name.

2. Enter a **"Folder Name."**

To expand or close a folder, click the triangle to the left of the folder.

Select the location for the new folder.

3. Click **"Create Folder."**



You will be redirected to your Document Vault and receive system confirmation of your successful creation of a new folder.

Your new folder now appears both on the left folder navigation pane and also within the Document Vault list.

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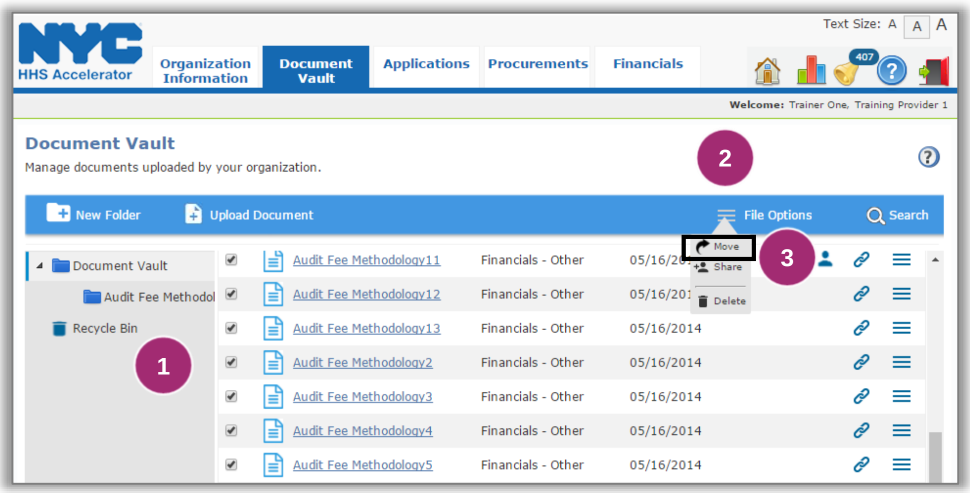
Moving Documents/Folders

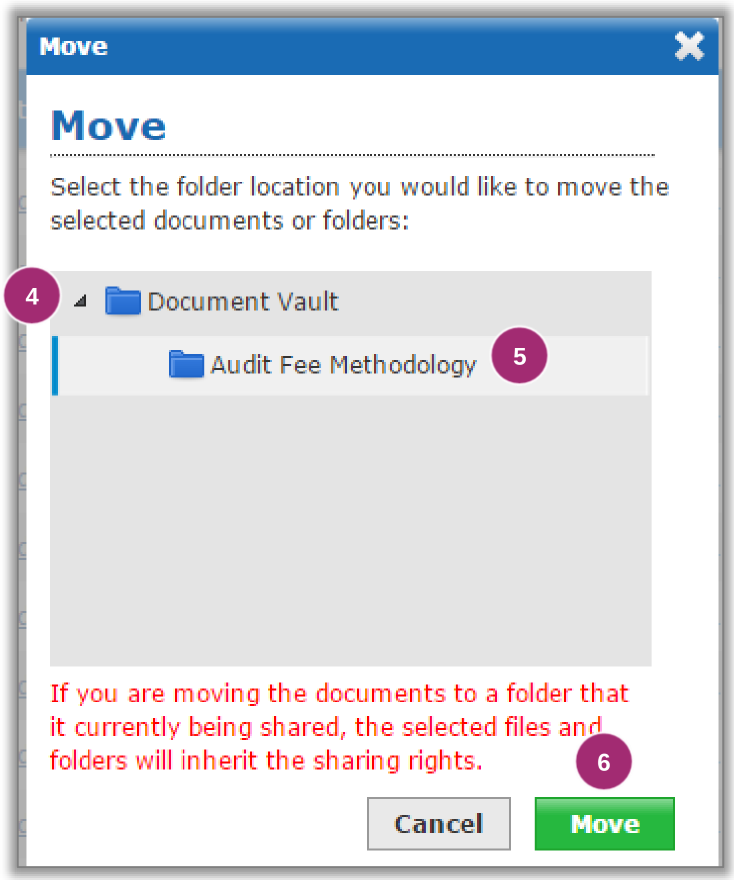
Your documents (or folders) can be moved to any folder located in your Document Vault.



1. Click the "**Checkbox"** to the left of the document(s) or folder(s) you want to move.

2. Click **"File Options"** Icon.

3. Select **"Move"** from the File Options Menu.



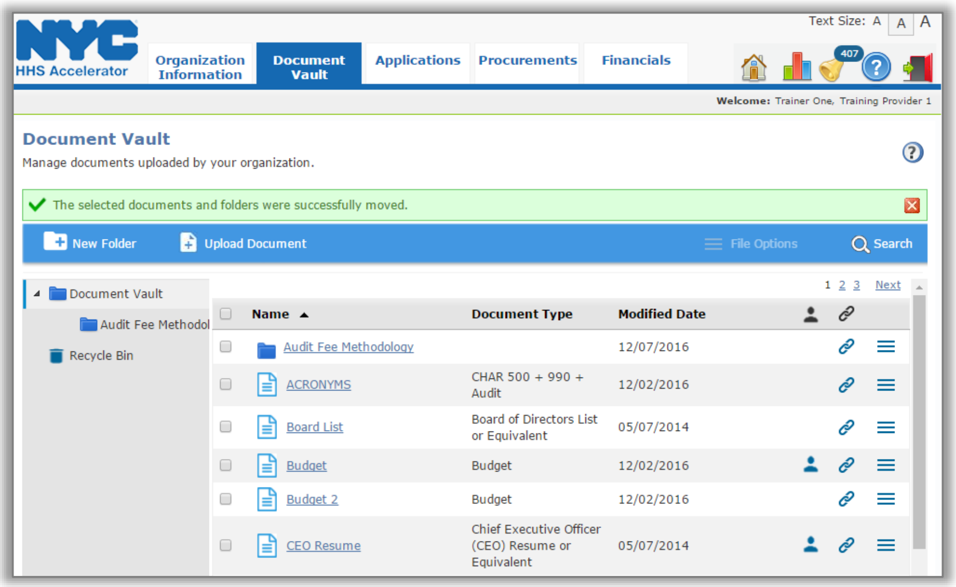
A window will pop-up requesting that you select the folder location where you would like to move the selected documents or folders.

4. Click the **"Triangle Icon"** to the left of the Document Vault folder to expand the folder structure.

5. Click the "**Folder"** you want to move the document/folder to.

You know the folder has been selected when a blue line appears to the left of the folder name.

6. Click **"Move."**



You will be redirected to your Document Vault and receive system confirmation of having successfully moved the selected documents/folders.

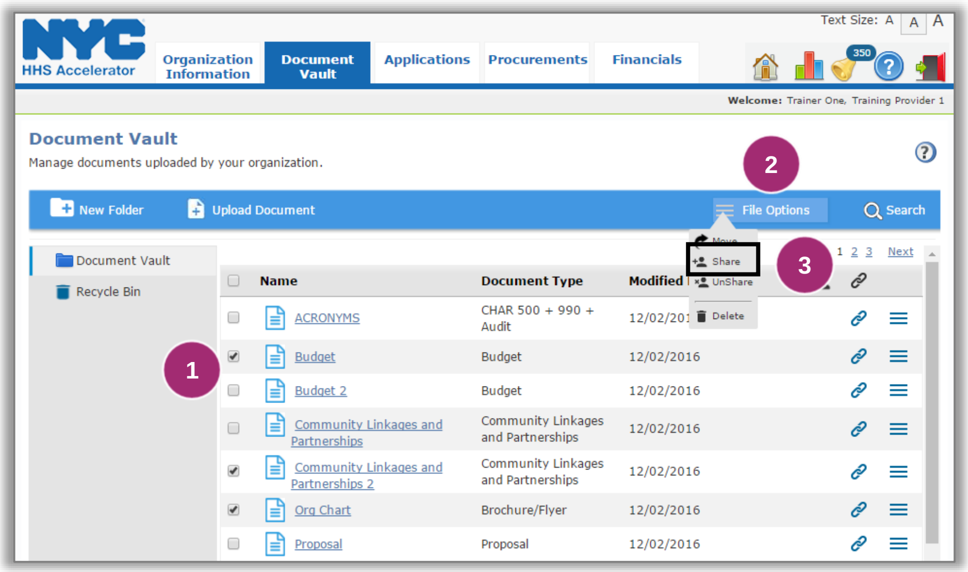
If you move a documents/folders to a folder that is already being shared, the selected documents/folders will inherit the destination folder's sharing rights.

Sharing and Un-Sharing Documents/Folders

Sharing Documents/Folders

There are many reasons your organization might want to share a document or folder. 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. Each shared filed can be up to 12 MB.

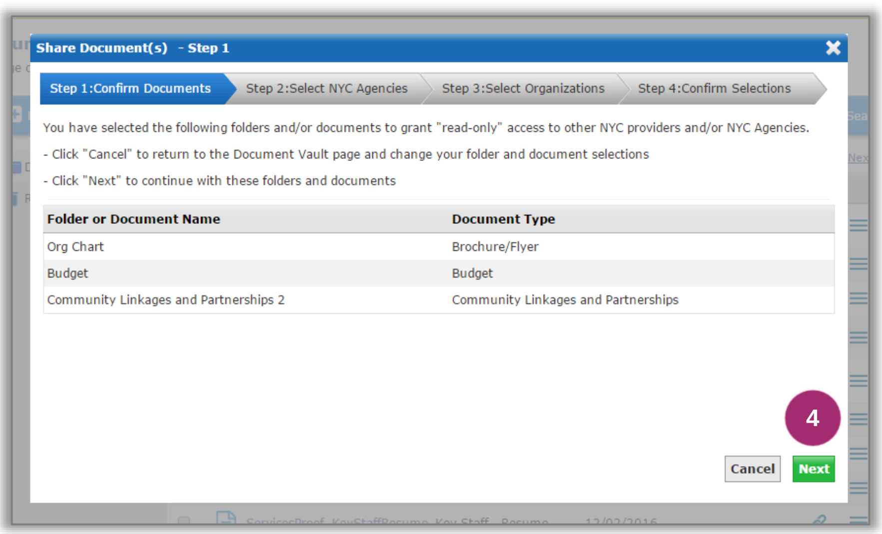
Only Level 2 System Users have the permission to share documents and folders.



1. Select the documents/folders you wish to share by clicking the **check boxes** to the left of the file names.

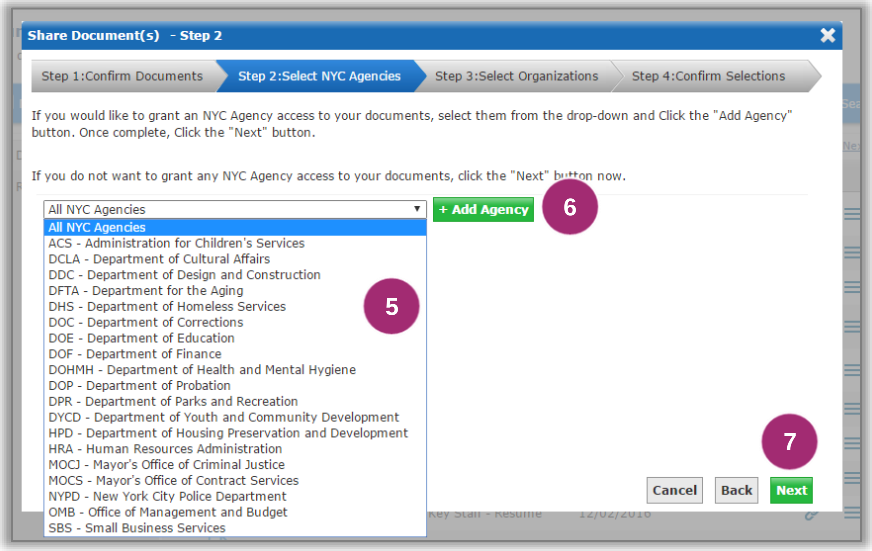
2. Click the **"File Options"** button.

3. Select **"Share"** from the "File Options" drop-down menu.



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

4. Click **"Next."**



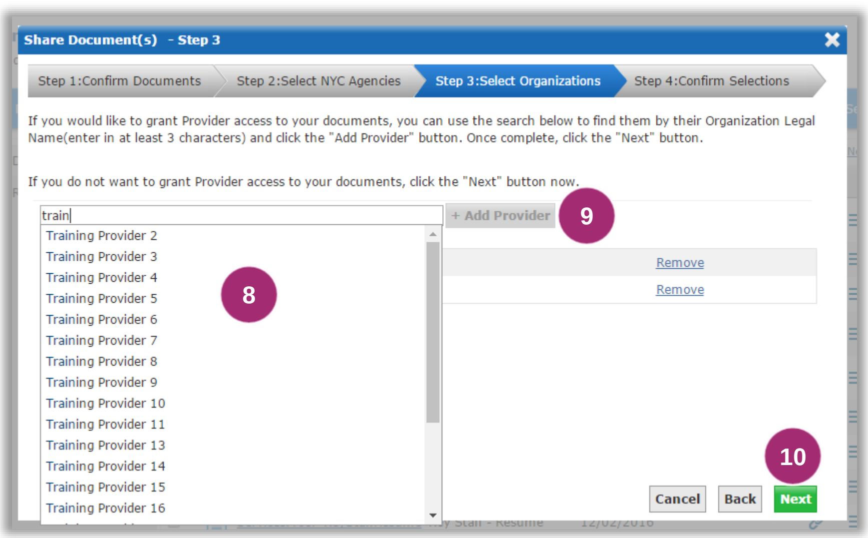
5. Select the **"Agency"** to share your document with from the drop down menu.

6. Click **"Add Agency."**

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

7. Click **"Next."**

*If you do **not** wish to share with a City Agency, click "Next."*

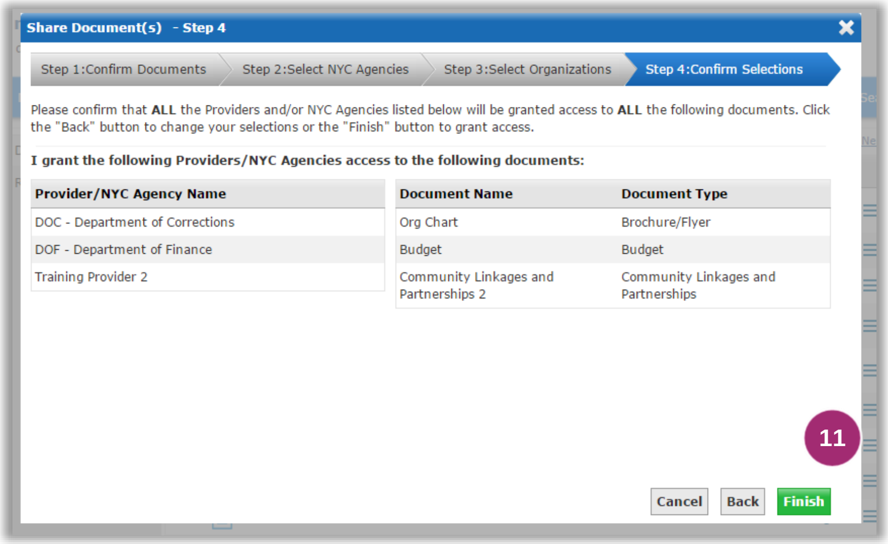


8. Start typing the **provider name** (the legal name) and click to select the provider from the drop down, which will populate.

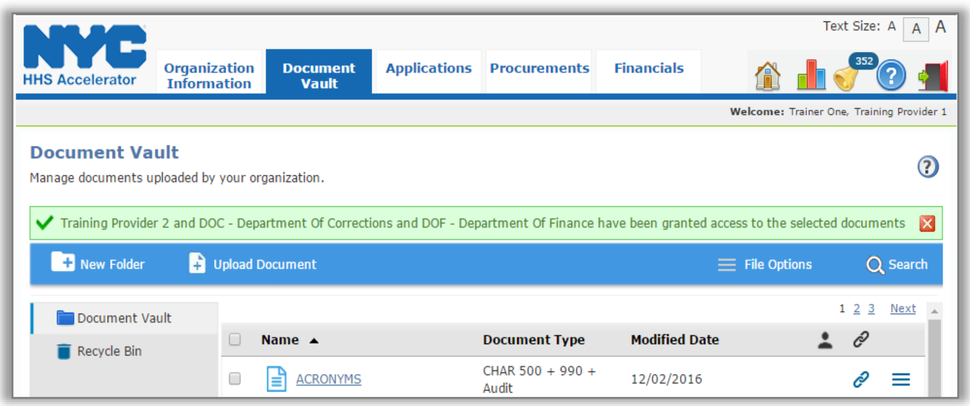
9. Click **"Add Provider."**

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

10. Click **"Next."**



11. Review your selections and click click **"Finish"** to confirm.



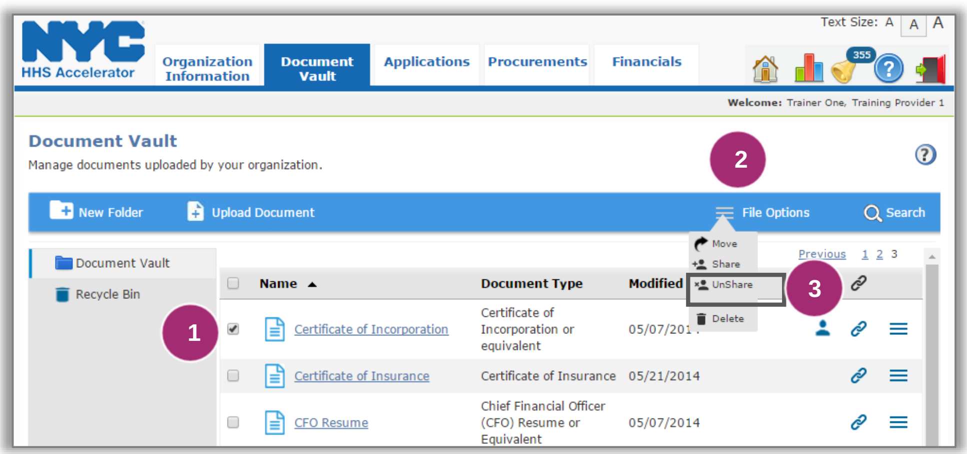
The system will then direct you back to your Document Vault to confirm the updated status of your files.

*The status of the documents you selected will now be **shared** indicated by the solid blue sharing icon:*

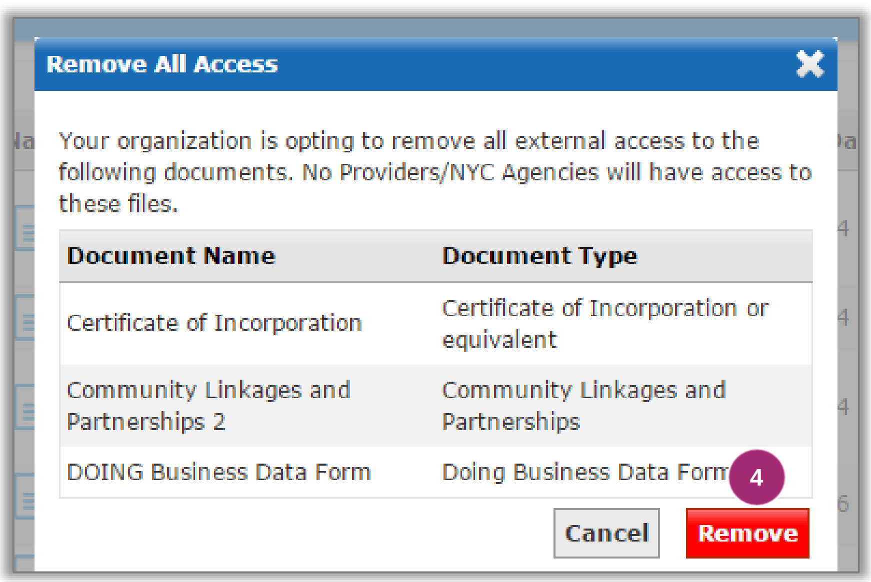
Permissions	Only **Level 2 System Users** have permission to share documents and folders.
Uploading/Moving Documents	Shared documents **continue to be shared** when uploaded or moved to an <u>unshared</u> folder. When moving documents to a <u>shared</u> folder, however, the files will **inherit** the destination folder's sharing rights.
Sharing Folders	Folders can also be shared (and un-shared). Just be aware that any folder moved to a shared folder will inherit the **destination folder's sharing rights.**

Un-Sharing Documents/Folders – Removing All Access

Un-sharing documents removes the viewing privileges of those whom you shared the documents/folders with. You can either remove **all external access** to a document(s)/folder(s) or you can **pick and choose the organizations** regarding which you would like to revoke the viewing rights.

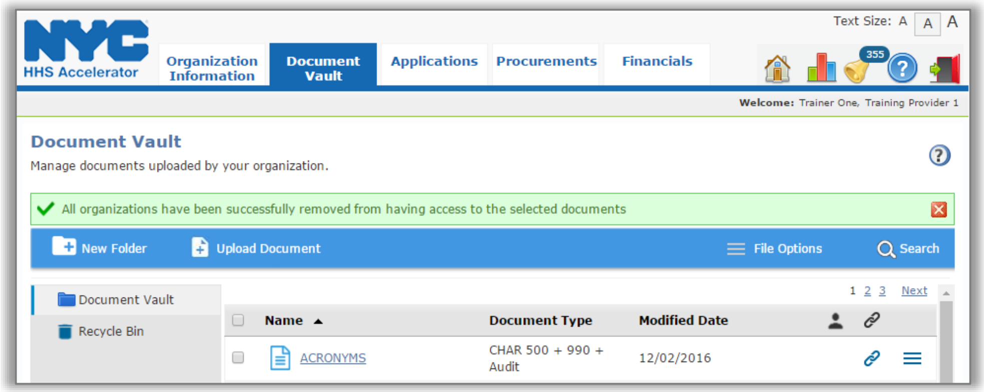


1. Select the documents/folders you wish to un-share by clicking the **check boxes”** to the left of the files.
2. Click the **“File Options”** button.
3. Click to select **“UnShare”** from the File Options drop down menu.



A pop-up will open to confirm the request.

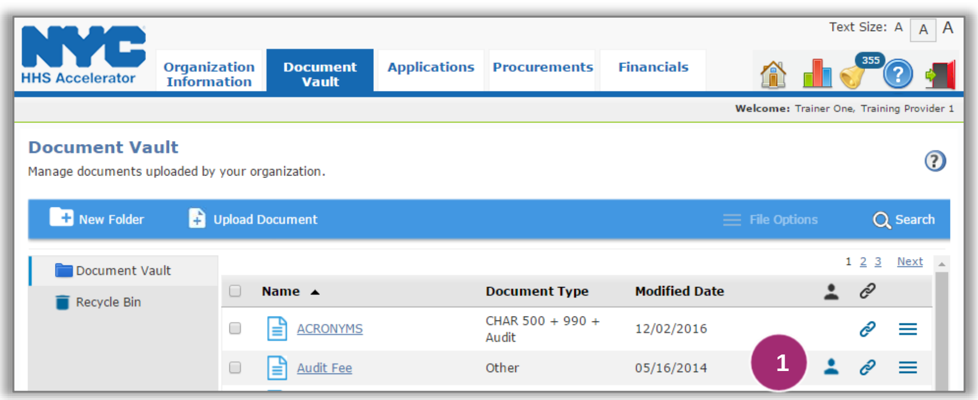
4. Click **“Remove.”**



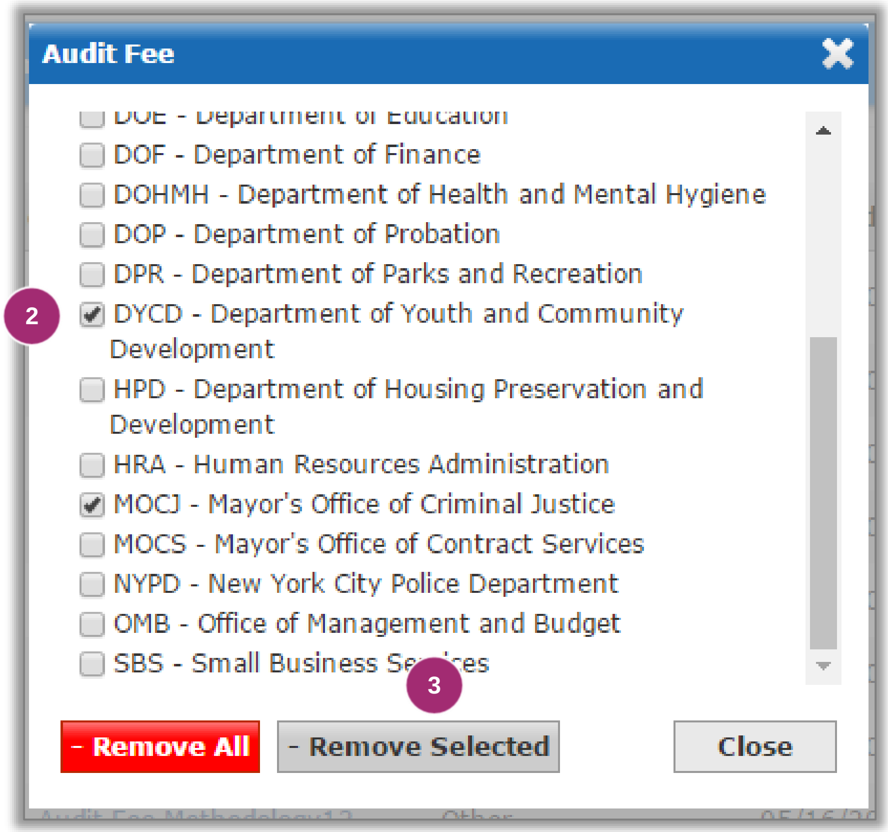
The system will then direct you back to your Document Vault to confirm the updated status of your files.

Un-Sharing Documents/Folders by Organization

You may also un-share documents/folders by organization. This option allows you to remove permissions for all documents/folders shared with a specific organization or City Agency.



1. Click the **Sharing icon** in the item line.



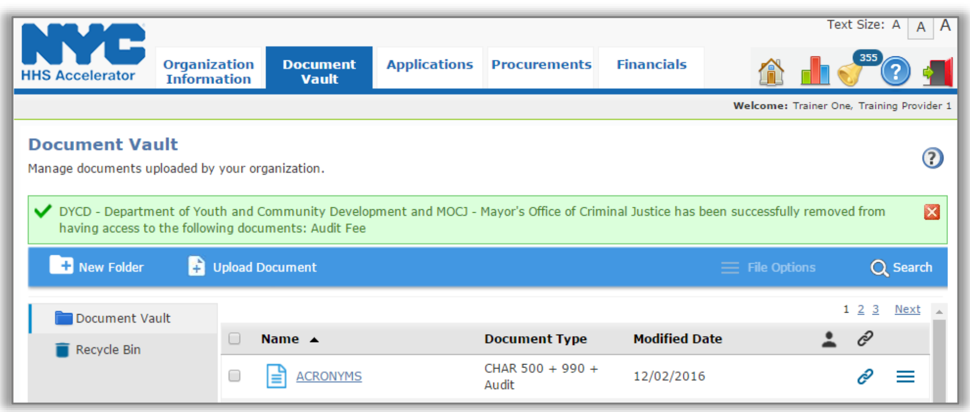
A pop-up will open.

2. Select the **Agencies/Organizations** whose viewing access you have chosen to remove.

3. Click **"Remove Selected."**

4. Click "**Close**" to close this pop-up window.

To remove access for all organizations listed, click 'Remove All" instead.

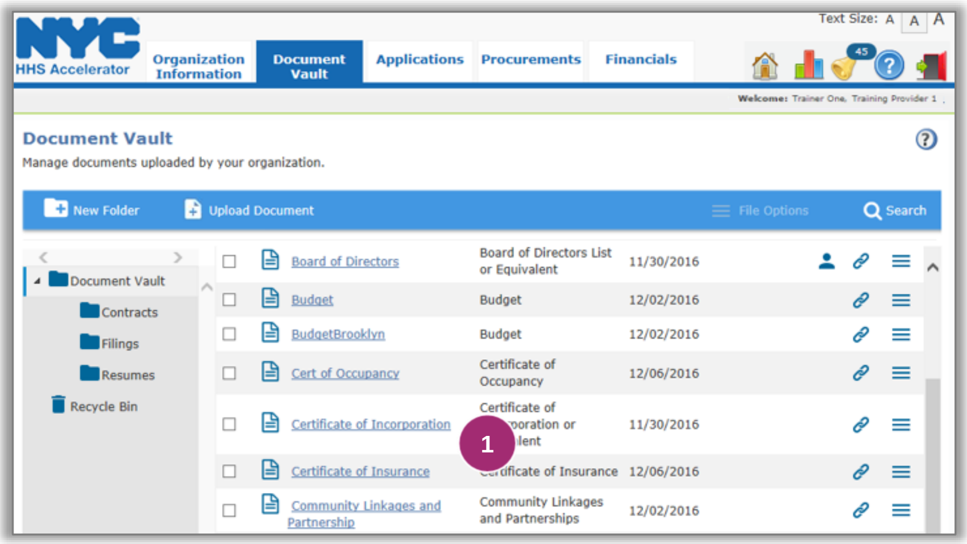


The system will then direct you back to your Document Vault to confirm the successful access removal.

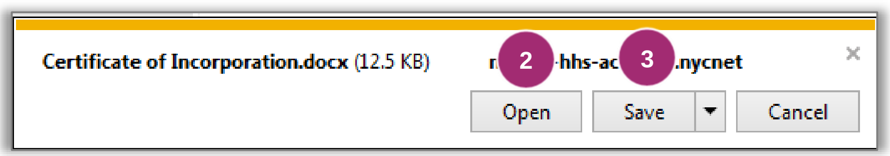
Document Vault Actions

Viewing and Downloading Documents

Your Document Vault documents can be downloaded so you can view and/or save them on your computer.



1. Click the hyperlinked **document name**.



2. Click "**Open**" if you would just to view the document.
3. Click **"Save"** if you would like to save the document to your computer.

This example is using Internet Explorer. You might see a different message depending on your browser settings.

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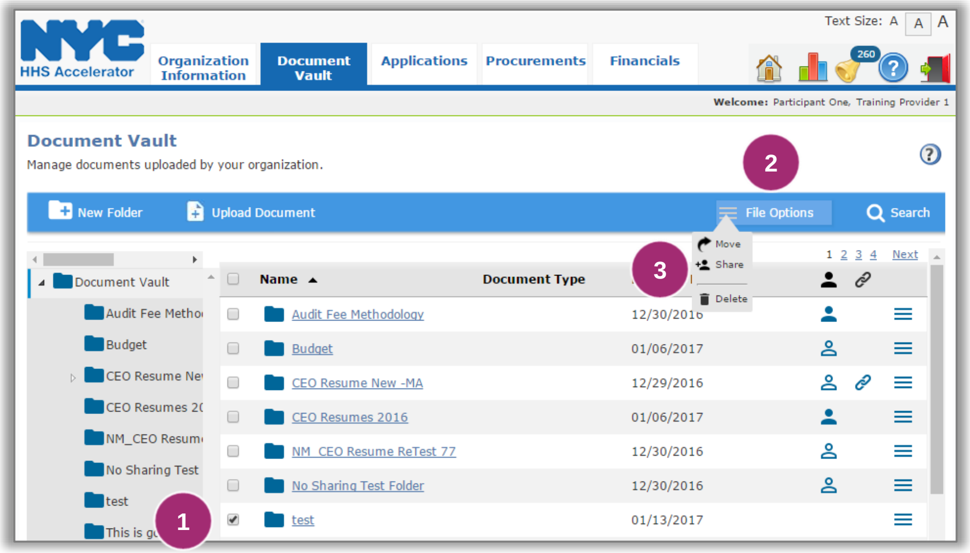
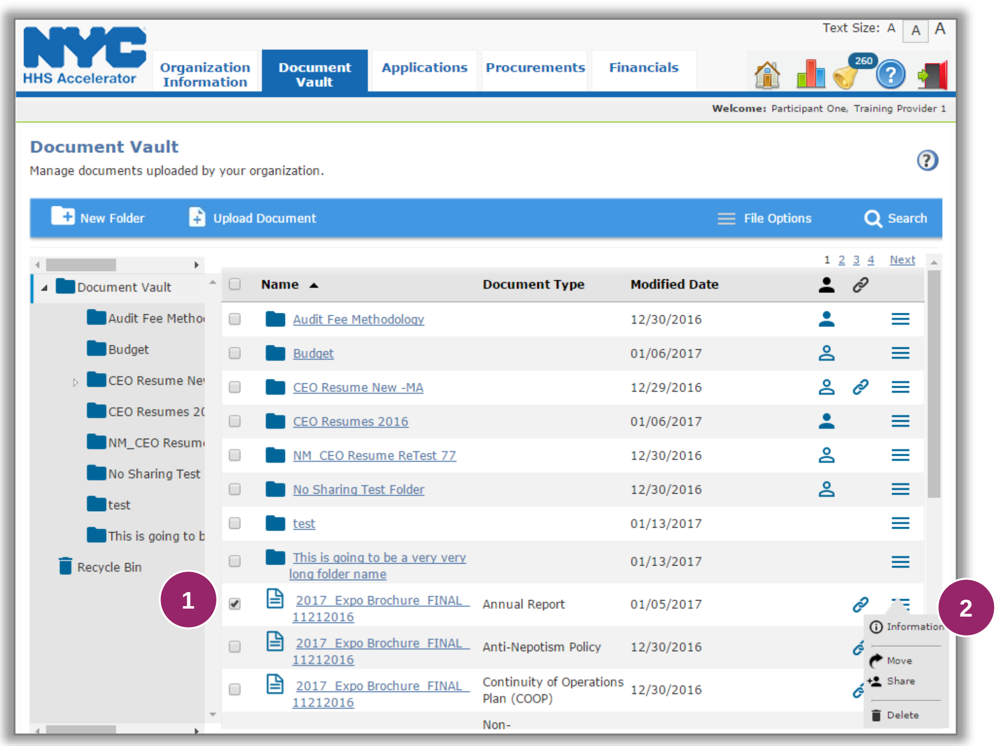
File Options for Documents/Folders



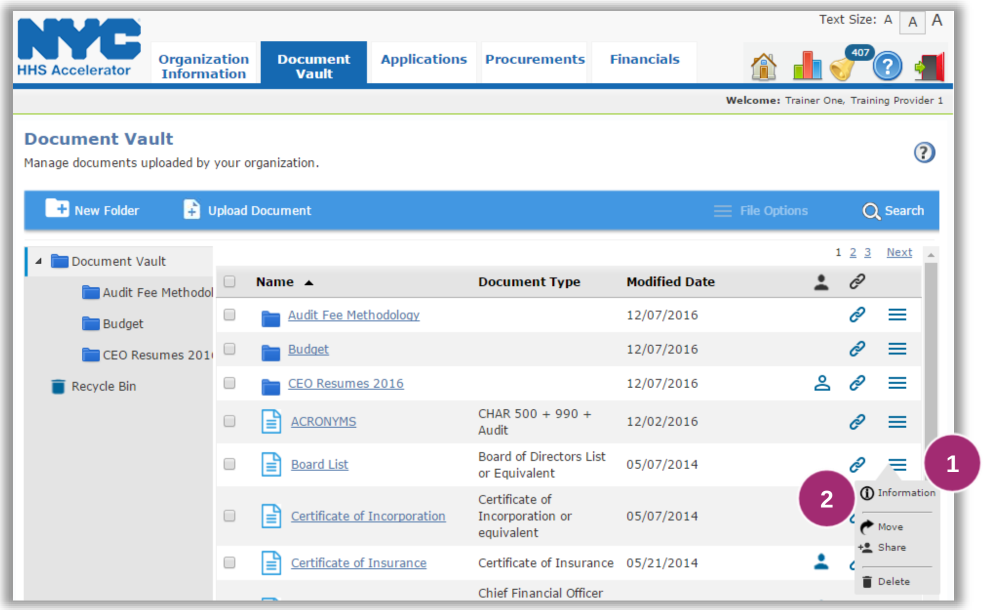
1. Click the **check boxes** next to the documents/ folders.
2. Click the **“File Options”** icon located in the blue file management bar.
3. From the **“File Options”** drop-down menu select to Move, Share, Unshare, or Delete.

File Options for a Single Document/Folder



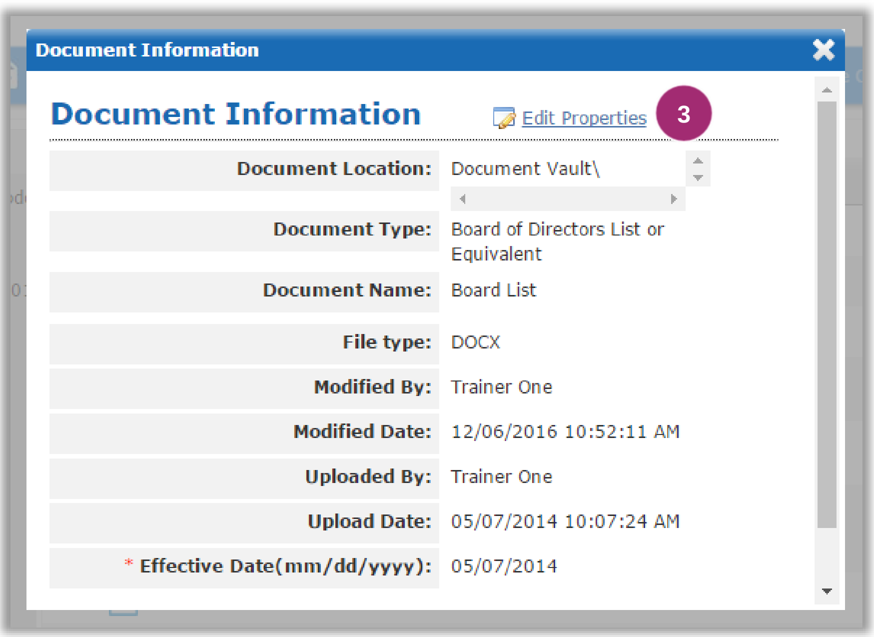
1. Click the **“File Options”** icon located in the corresponding document’s menu.
2. From the appearing **“File Options”** drop-down menu select to View Information, to Move, Share, Unshare, or Delete the document/folder.

Viewing Document/Folder Information and Editing Properties



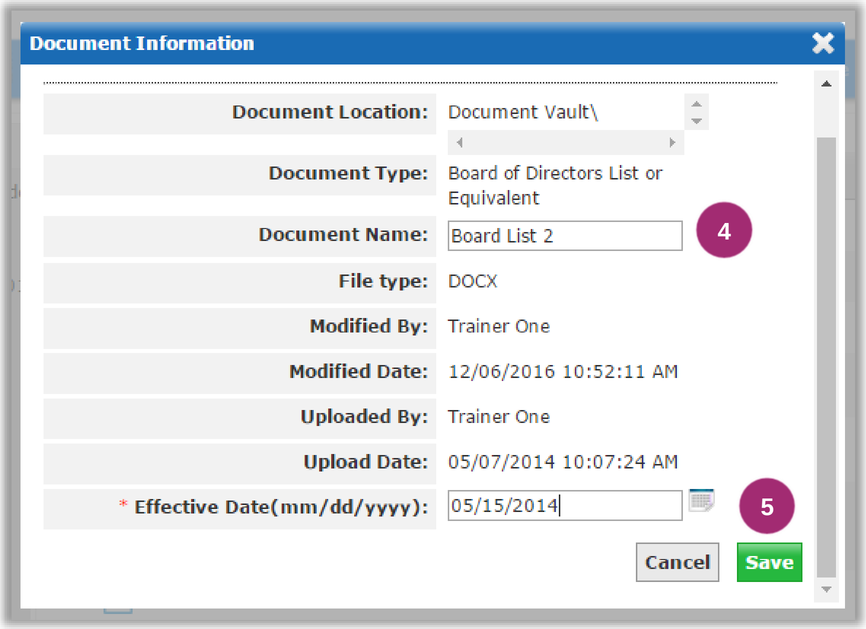
1. Click the **"File Options"** icon of the document/folder you would like to view/edit.

2. Select **"Information"** from the "File Options" drop down menu.



A window will pop-up displaying detailed document information.

3. If you wish to edit the file properties, click **"Edit Properties."**

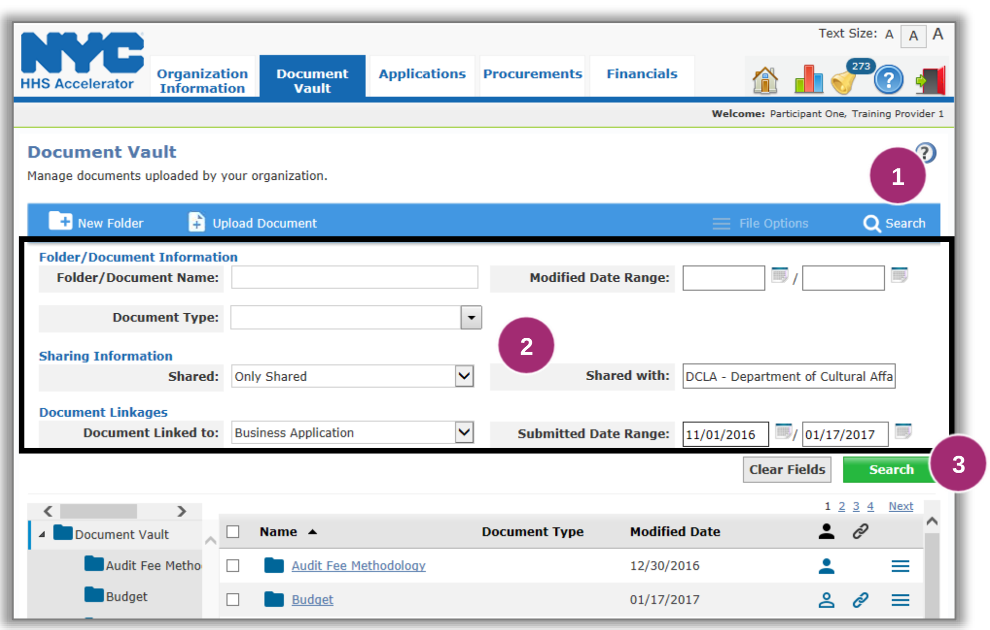


Depending on the file/folder type, certain fields will become editable.

4. Make desired updates.
5. Click **"Save."**

Searching your own Organization's Documents/Folders

You can search your Document Vault quickly and easily to locate documents or folders. Populate the fields in the Search Documents function to narrow down the results of your search.



1. Click the "**Search**" button to open the search function.
2. Enter information you would like to search for.

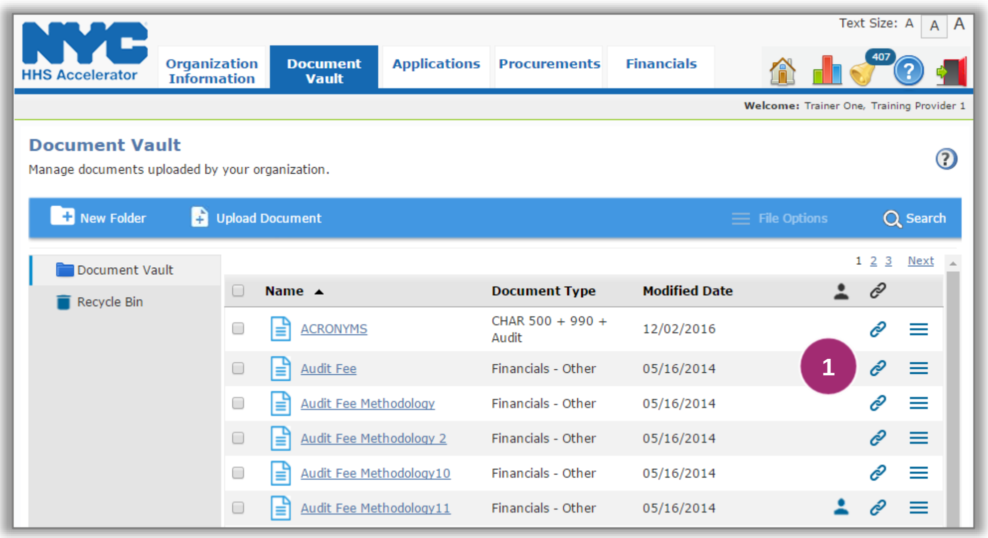
You may search by Folder/Document Name, Modified Date Range, Document Type, Sharing Information and Document Linkages.

3. Click **"Search."**

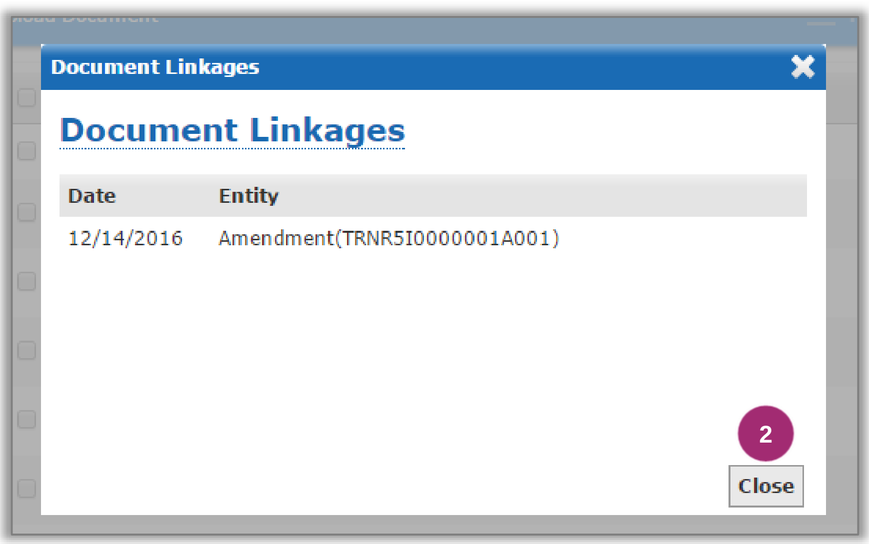
- To start a new search, click **"Clear Fields."**
- To close the Search Feature, click the **"Search Icon"** again, and the page will revert back to the original view.

Document Linkages

As your organization uses HHS Accelerator, if a document is attached to an Action in the system, a copy of the document will automatically be saved to your organization's Document Vault. The Linkage Icon indicates that a document in the vault is linked to an HHS Accelerator Transaction, and cannot be deleted. To view what transaction the document is linked to, follow the steps below:



1. Click the "**Linkage Icon"** to view the task(s) the document is linked to in the system.



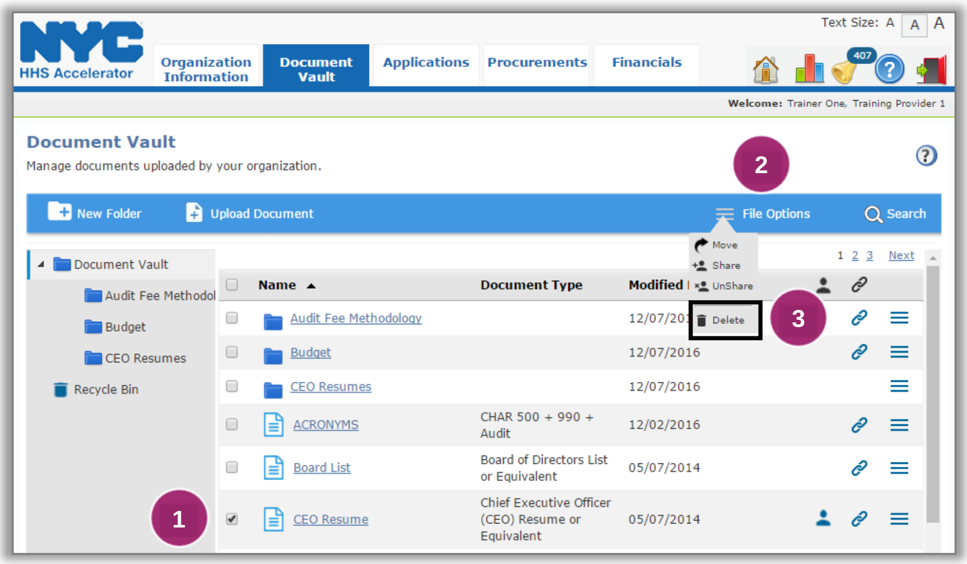
A window will pop-up displaying the task(s) the document is linked to.

2. Click "**Close**" after reviewing the Document Linkages.

In the Document Vault you **cannot delete** a document that is **linked** to an HHS Accelerator transaction in the system. If revisions to a document are requested, you have to make changes in the task and not in the Document Vault.

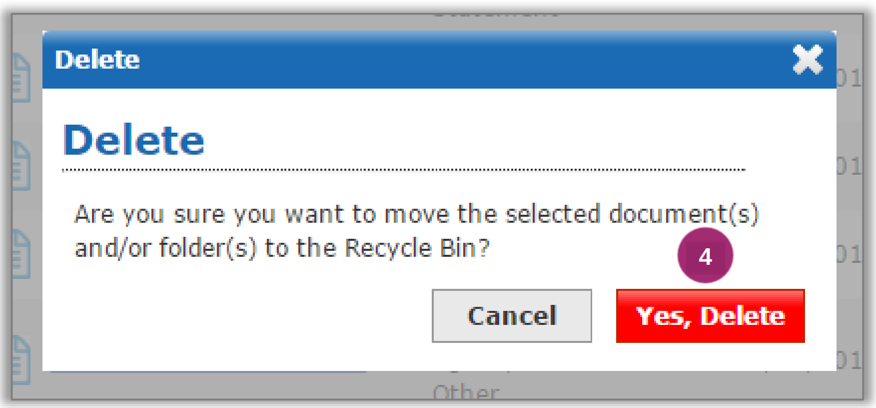
Deleting Documents/Folders

Deleting a document/folder from your Document Vault will move the selected item(s) into your **"Recycle Bin."** From your Recycle Bin, deleted items can be restored or permanently deleted. Before you choose to permanently delete a file from your Document Vault, it is advised that you always save a copy to your computer for record-keeping purposes.



1. Click the **check boxes** next to the document/folder names.
2. Click the **"File Options"** button.
3. Select **"Delete"** from the "File Options" drop down menu.

A window will pop-up to confirm that you would like to delete the document.



4. Click **"Yes, Delete"** to delete the files.

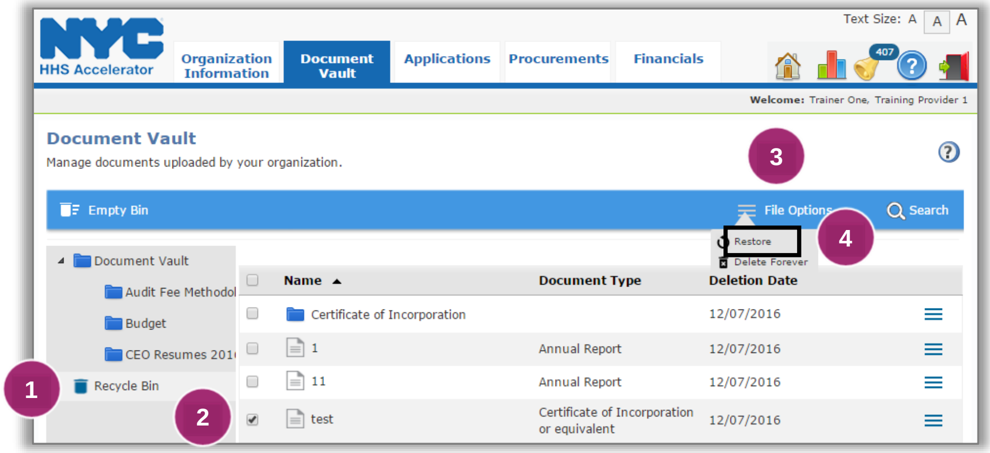
The document has now been moved to the Recycle Bin located in your Document Vault.

You will be redirected to your Document Vault and receive system confirmation of your successful deletion of the selected file(s).

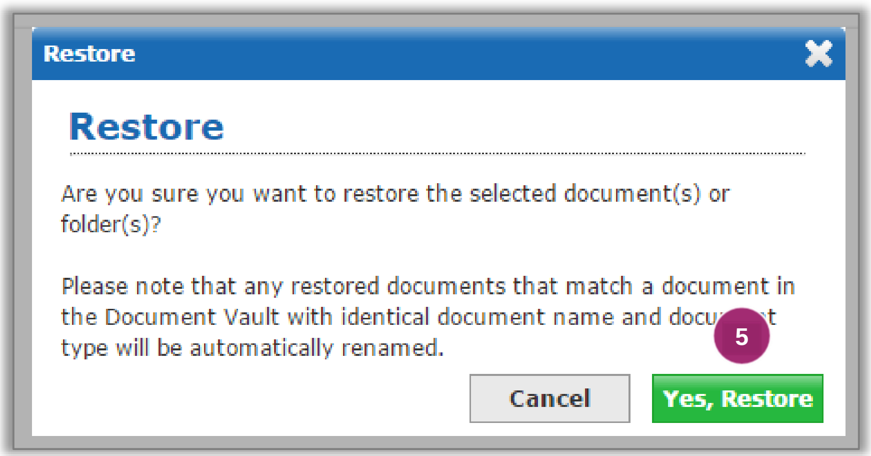
The system will notify you if a document or folder to be deleted is currently being shared with another organization. If you choose to proceed, the sharing privileges will be deleted permanently and cannot be restored.

Recycle Bin: Restoring Deleted Documents/Folders

Once a file is deleted from your Document Vault, it is moved to the Recycle Bin in your Document Vault. Deleted files located in your Recycle Bin can either be permanently deleted or restored. A deleted document/folder located in your Recycle Bin can be restored at any time. Once restored, the document/folder can be found in the location it was in prior to deletion.

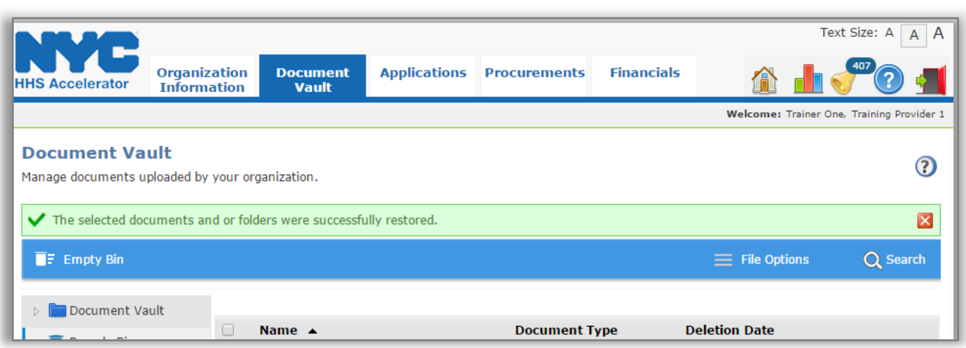


1. Click on the **"Recycle Bin"** icon.
2. Click the **check boxes** next to the document/folder names you want to restore.
3. Click the **"File Options"** button.
4. Select **"Restore"** from the "File Options" drop-down.



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

5. Click **"Yes, Restore"** to restore your document.



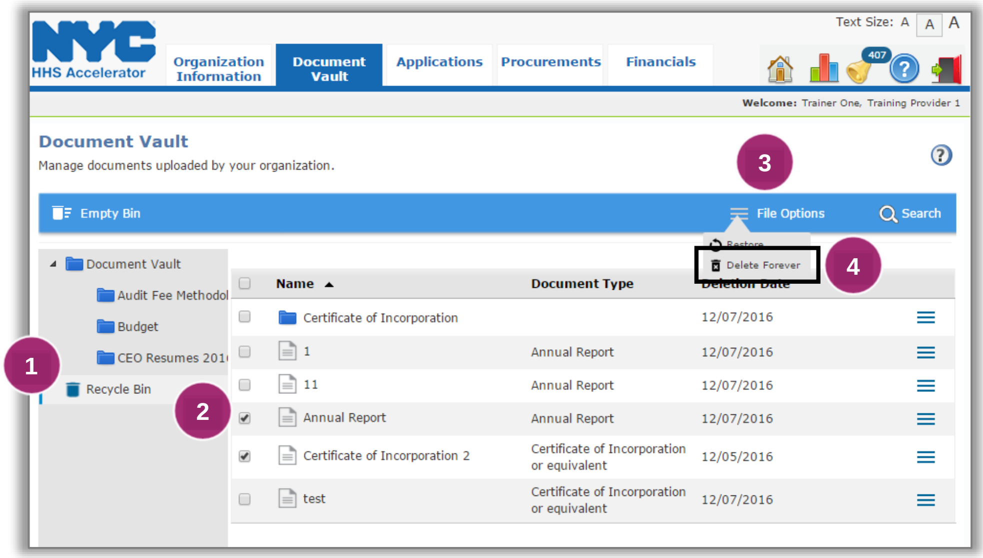
The document has now been restored to its prior location in your Document Vault.

You will be redirected to your Document Vault and receive system confirmation of your successful restoration of the selected file(s).

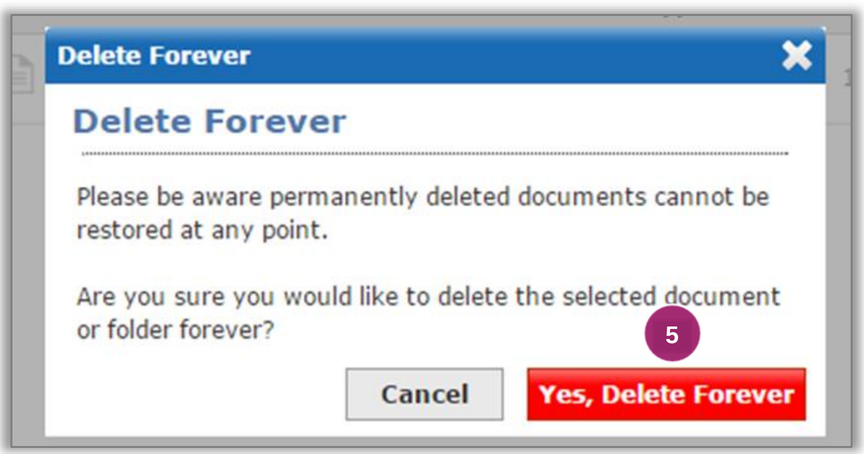
Recycle Bin: Permanently Deleting Documents/Folders

Before you choose to permanently delete a file from your Document Vault, it is advised that you always save a copy to your computer for record-keeping purposes.

Once a documents is permanently deleted, they cannot be recovered. Should you choose to permanently delete a file from your Document Vault, it is advised that you always save a copy for record-keeping purposes.

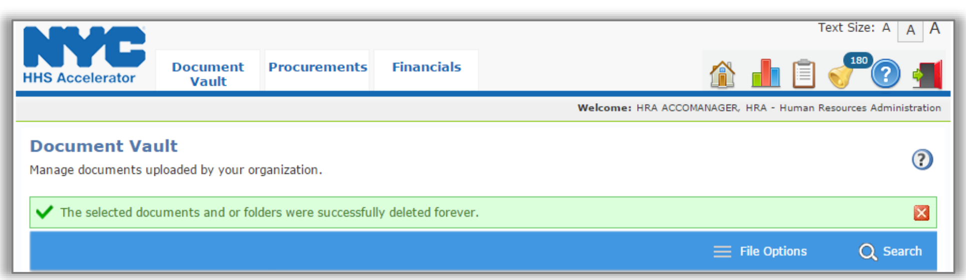


1. Click on the **“Recycle Bin”** icon.
2. Click the **check boxes** next to the document/folder name(s) you want to permanently delete.
3. Click the **“File Options”** button.
4. Select **“Delete Forever”** from the “File Options” drop-down.



A window will pop-up to confirm the request.

5. Click **“Yes, Delete Forever”** to permanently delete your document.



The document is now permanently deleted and cannot be recovered.

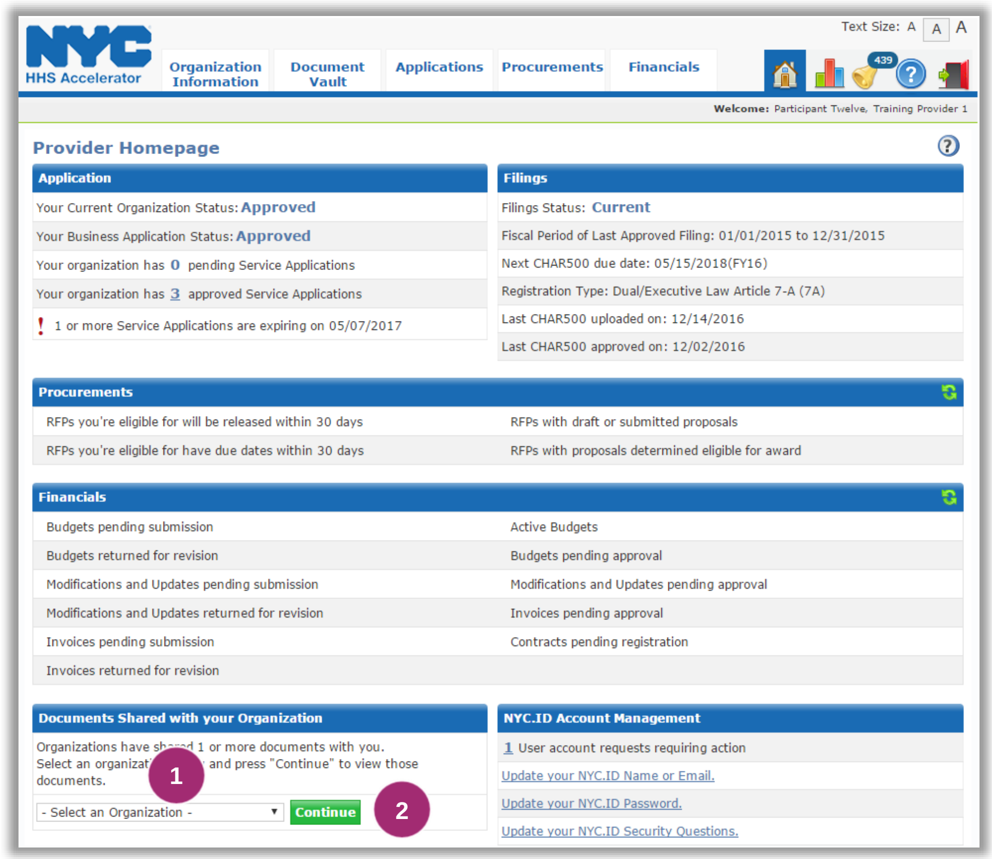
You will be redirected to your Document Vault and receive system confirmation of successful permanent deletion of the selected file(s).

HHS Accelerator

Accessing Externally Shared Documents

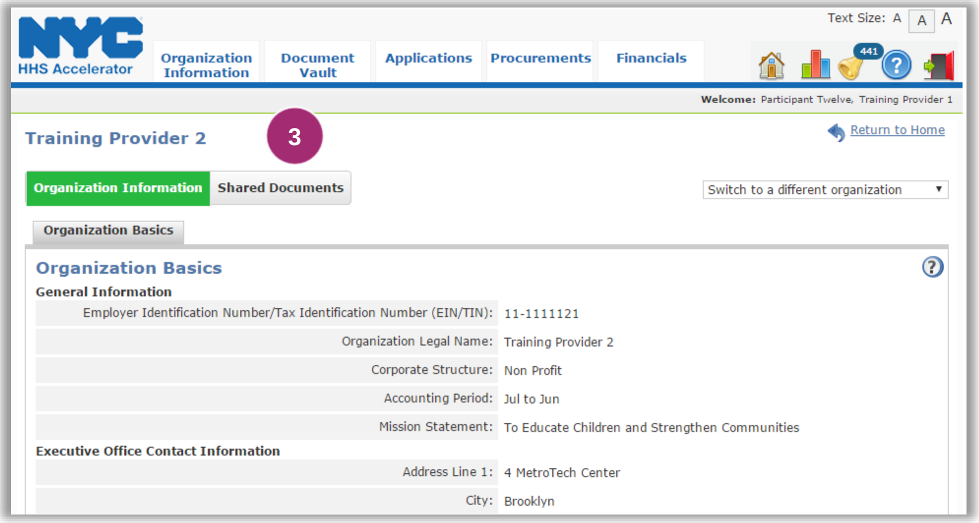
NYC Agencies and other organizations with HHS Accelerator accounts can share documents with your organization.

You can view documents shared with your organization directly from your organization's homepage. On the dashboard **"Documents Shared with your Organization"** a notification will read "Organizations have shared 1 or more documents with you." To access documents shared with your organization, follow the steps below:



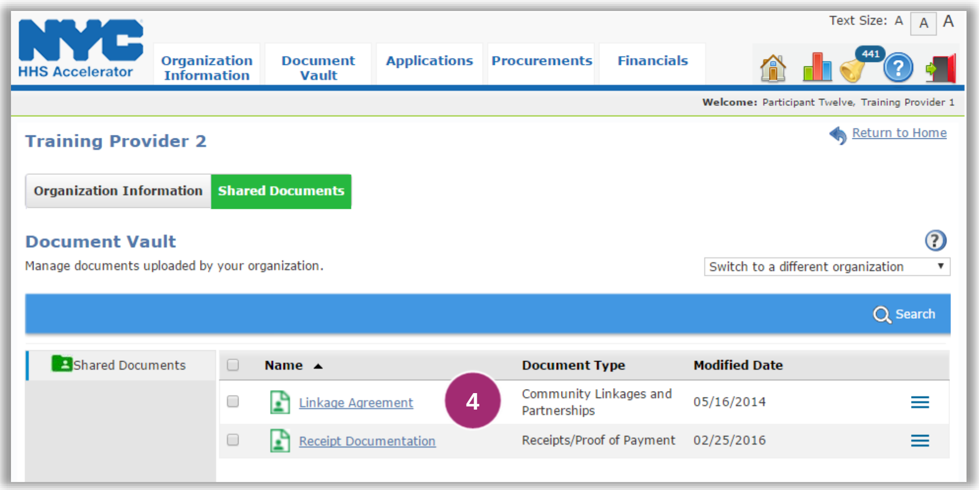
1. From the **"Documents Shared with your Organization"** dashboard, use the drop-down menu to select an organization.

2. Click **"Continue."**



The "Organization Information" tab displays basic information on the organization you selected.

3. Click the **"Shared Documents"** tab.



Documents that have been shared with your organization will be displayed.

4. Click the **"Document Name"** hyperlink to open or save the file to your computer.

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