Sharing Documents to Public Health Solutions in the Document Vault

Generally, sharing files begins in the "Document Vault", where you upload documents such as Financial Statements, Certificate of Insurance, etc. Once you upload a document(s) to the Document Vault, you are able to share them. These instructions demonstrate how to share documents with Public Health Solutions (PHS).



After opening the Document Vault, you will see on the right side the three bars - click on this and you will see an option to "share" documents.

HHS Acc	elerator Organization Information	Document Application Vault	s Procurements Finan	icials			
	Share Document(s) - Step				X Center, Inc.		
Docur Manage d	Step 1:Confirm Documents	Step 2:Select NYC Agencies	Step 3:Select Organization	Step 4:Confirm Selection	is ?		
	You have selected the following	ig folders and/or documents to g	rant "read-only" access to othe	r NYC providers and/or NYC Ag	encies.		
V The	- Click "Cancel" to return to th	ne Document Vault page and cha	change your folder and document selections				
	- Click "Next" to continue with these folders and documents						
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The window above opens, and you'll see "**Share Documents - Step 1** In this example, the organization is sharing the Contract Contact Verification Form (CCVF). Next, you will see this pop up window, **Share Document(s) Step 2**, asking if you want to share with "All NYC Agencies" - *Do nothing on this page except click on "NEXT" - lower right hand corner*



The window **Step 3: Select Organizations pops up**. In the cell you then type in "Public Health Solutions"

	tile was successfully uploaded to your Document Vault.	
	Share Document(s) - Step 3	×
	Step 1:Confirm Documents Step 2:Select NYC Agencies Step 3:Select Organizations Step 4:Confirm Selections	Bea
	If you would like to grant Provider access to your documents, you can use the search below to find them by their Organization Legal Name(enter in at least 3 characters) and click the "Add Provider" button. Once complete, click the "Next" button.	Ne
F	If you do not want to grant Provider access to your documents, click the "Next" button now.	=
	+ Add Provider	=
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Continuing on STEP 3, Once "Public Health Solutions" is typed in, click on "Add Provider"

Share Document(s) - Step 3 Step 1: Confirm Documents Step 2: Select NYC Agencie Step 3: Select Organizations Type 4: Confirm Selections If you would like to grant Provider access to your documents, you can use the search below to find them by their Organization Legal Name(enter in at least 3 characters) and click the "Add Provider" button. Once complete, click the "Next" button. If you do not want to grant Provider access to your documents, click the "Next" hutton now. Public Health Solutions Granting access to the following: Cancel Back Next	The	file was successfully unloaded to your Document Vault.						
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Continuing in STEP 3, Public Health Solutions will then be added - see below. Select "Next" in the lower right hand corner

file was successfully unloaned to Share Document(s) - Step 3	your Document Vault.		
Step 1:Confirm Documents	Step 2:Select NYC Agencies	Step 3:Select Organizations	Step 4:Confirm Selections
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		+ Add Provider	
Granting access to the foll	owing:		
Public Health Solutions		Re	move

You will now be in **STEP 4: Confirm Selections**. The window will look like the following below. Select "Finish".



You are then returned to the page below and will see "Public Health Solutions has been granted access to the selected documents".

Document Vault Manage documents uploaded by your organization.								?	
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