

# Job Aid: Monitoring Document Upload Tool



## Overview

The Monitoring Document Upload Tool allows Vaya Health (Vaya) network providers to securely upload documentation requested for monitoring purposes. It replaces other documentation submission methods, including secure email, fax, and hand-delivery, enabling Vaya staff to process documentation more quickly and efficiently.

This job aid explains how Vaya provider network staff can access the Monitoring Document Upload Tool and use it to send documentation to the Vaya Quality Management (QM) Department for investigations and audits.

**If you need help, contact the Vaya employee who requested the documentation.** If you need technical assistance, the Vaya employee will contact Vaya's Information Services Division.

**Click any section below for details:**

[Section 1: Accessing the Tool](#)

[Section 2: Uploading Documents](#)

## Section 1: Accessing the Tool

### Step 1

A Vaya QM staff member will send you an email invitation to the Monitoring Document Upload Tool via ZixMail, a secure email service.

This email will be encrypted. Select **“Open Message”** to view it.

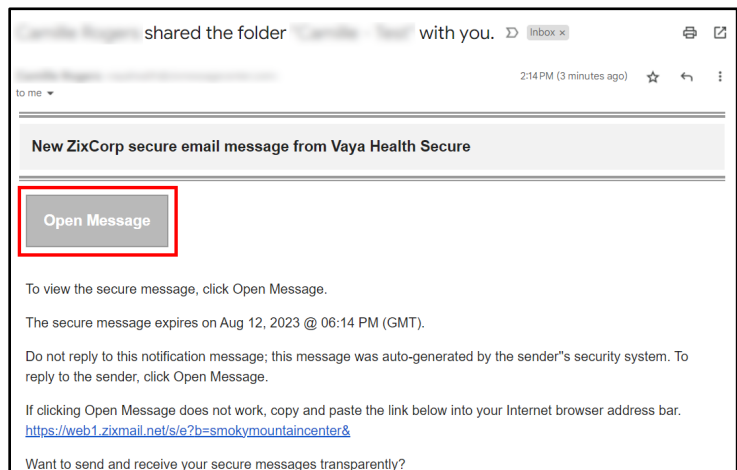


Figure 1: Encrypted email example.

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### Step 2

If you have not used Zixmail previously, you will be prompted to set up a password and register your email account.

**If you already have an account and know your password, skip to [Step 4](#).**

Enter and re-enter a password, which must meet the following minimum requirements:

- Contains both numbers and letters
- Contains both uppercase and lowercase letters
- Contains at least one special character such as ~!@#%^^&

Select the **“Register”** button to proceed.

Figure 2: Zixmail registration.

### Step 3

You may be prompted to verify your email address. If so, you will receive an email with an activation link. Select the link, and then select either **“Activate”** or **“Decline.”**

**Note:** Declining will prevent you from accessing ZixMail.

Figure 3: Zixmail account activation

### Step 4

After logging into or activating your new account with ZixMail, you will see the invitation email.

Select **“Show Images”** to see the full message, including all formatting and images.

Figure 4: “Show Images” button.

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## Step 5

Select the folder name (outlined in red in Figure 4) or the “Open” button at the bottom of the email to access the Monitoring Document Upload Tool.

**Note:** Forwarding this email to someone else does not give them access to the Monitoring Document Upload Tool. If someone else on staff needs access, please request it from Vaya staff.

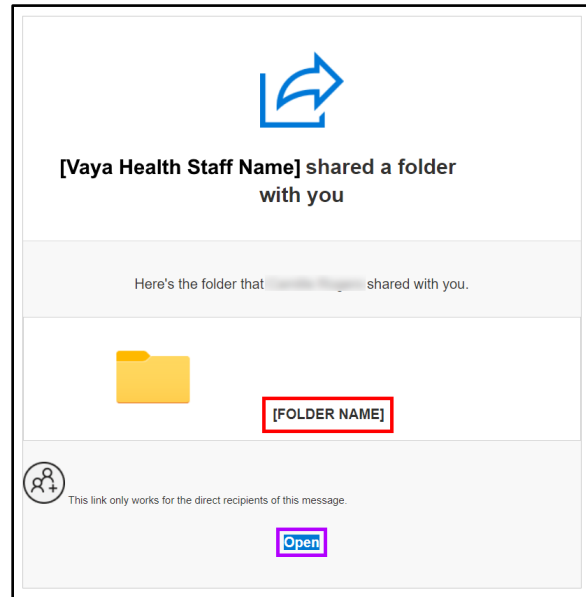


Figure 5: Email with images.

## Step 6

If your email address is not associated with a Microsoft account, you will log in using a verification code.

**If you are prompted to log in without a verification code, skip to [Step 7](#).**

To begin the verification process, select “Send Code.” An email from [no-reply@notify.microsoft.com](mailto:reply@notify.microsoft.com) will send an eight-digit access code to the email address you used to register your account.

Copy the access code in the email, paste it into the box, then select the “Verify” button.

Once you are logged in, skip to Section 2.

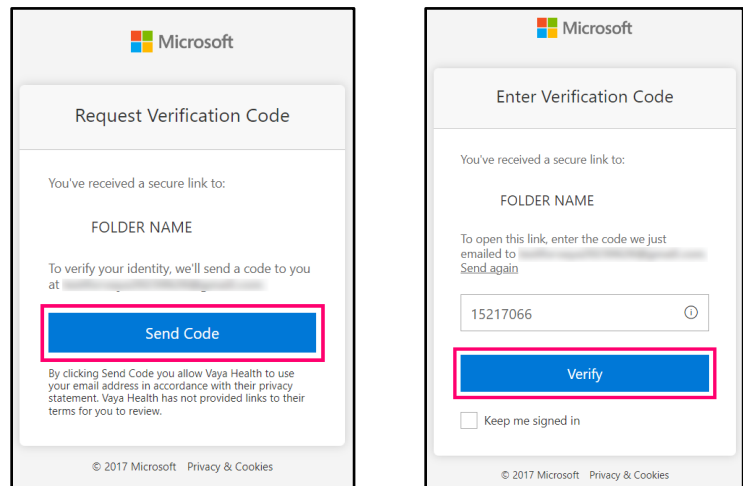


Figure 6: Requesting and entering the Verification Code.

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## Step 7

If your email address is associated with a Microsoft account, you may be asked to log into your Microsoft account to access the tool.

To begin that process, select the **“Next”** button.

On the **“Review Permissions”** screen, select **“Accept”** to allow the name, email address, and photo associated to your Microsoft account to be shared with Vaya.

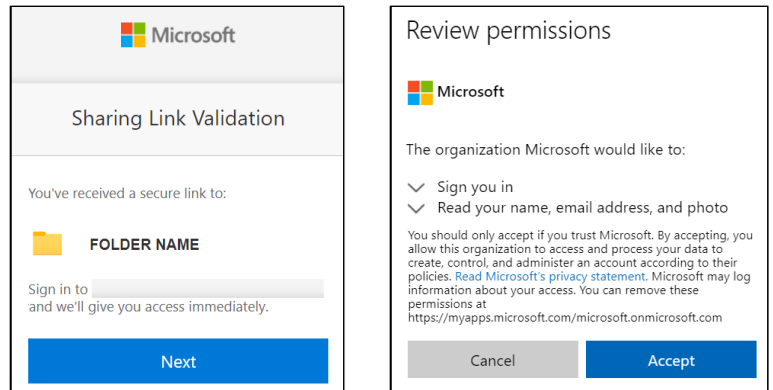


Figure 7: Granting Microsoft permissions.

## Section 2: Uploading Documents

### Step 1

If you are not automatically directed to the Monitoring Document Upload Tool, reopen the invitation in your email inbox and select the folder name or the **“Open”** button at the bottom of the email to access it.

**Tip:** Bookmark the Monitoring Document Upload Tool to access it quickly in the future.

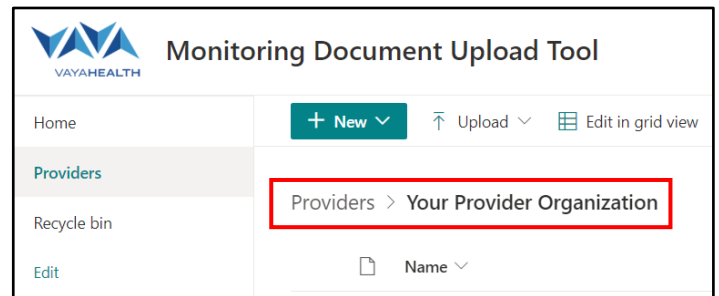


Figure 8: Provider folder

### Step 2

To begin uploading documentation, select the **“Upload”** button, and then select **“Files.”**

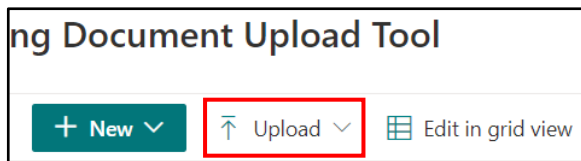


Figure 9: Upload button

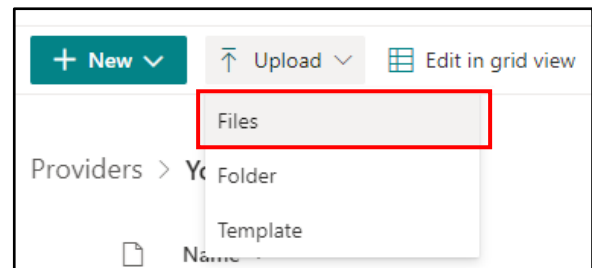


Figure 10: “Files” option

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## Step 3

In the file section window, locate the files you wish to upload, select each file, and select the “Open” button.

To upload multiple files at once, hold down the “ctrl” key and select each file before selecting “Open.”

**Note:** The following special characters will prevent a file from uploading and should not be included in file names: " \* : < > ? / \ | and any space at the beginning or end of the file’s name.

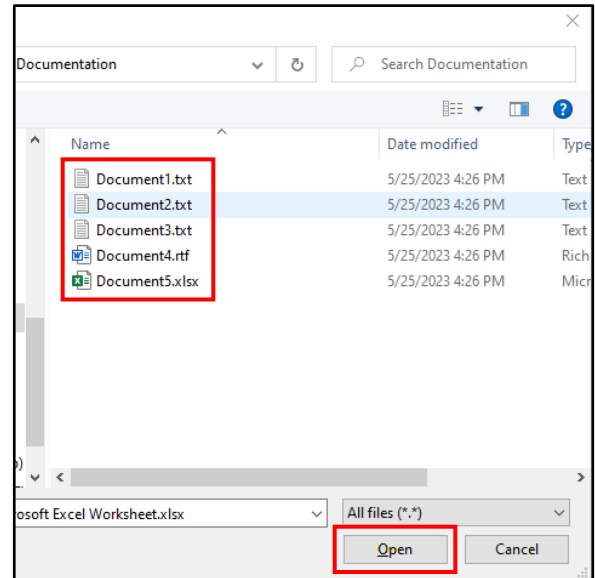


Figure 11: File Selection window

## Step 4

Uploaded files will become visible in the tool temporarily and then disappear from the folder. This is normal and indicates that Vaya staff can now access the uploaded documents.

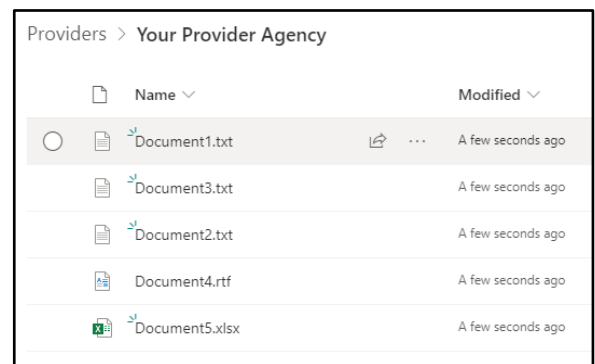


Figure 12: Temporary view of uploaded documents.

## Step 5

Repeat Steps 2 and 3 to upload additional files. You will continue to have access to the Monitoring Document Upload Tool until Vaya has received all necessary documents.

## Step 6

Once you have uploaded the requested files, close the Monitoring Document Upload Tool page. Vaya staff are automatically notified when files have been uploaded, so notifying staff is not necessary.