PolicyTech® 9.5.1 Quick Reference — Approver



Access a Document

You can access the document in two ways:

- In your email application, open the Approval Required message and click the link. You received this email because you were assigned as an approver.
- In PolicyTech, click My Tasks and find the document under Approve. You have this task because you were assigned as an approver.

If the document is currently checked out, you can select **Notify me by email when the document is no longer checked out**. Or, click **OK** to view the document in read-only mode.

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	None
	Notes:
	Click the document title above to accept, decline, or make revisions to the document.
	Tom Hansen submitted "Production Safety Guidelines" for your approval.
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	donotreply@policytech.com
	Thu 9/22/2016 7:27 AM

PT PolicyTech® Policy & Procedure Management	■ MY TASKS
🗅 Documents 🗸 🗸	Approve the following docu
🕑 My Tasks	Title
Lill Reports	Travel Expense Form (v.1)

Warning	
You are in read only mode.	
The document is currently checked out by Douglas Johnson in Corporate Headquarters: Administration.	
Notify me by email when the document is no longer checked out.	
	ОК

Susan Howard, 12-Feb-14 1:22:00 PM inserted: changes other modificationchanges) purposes. As soon as the lization copies are placed in draft phase, cation that the copies are ready to be

Approve a Document

You can choose one of several responses:

- Accept. Accept the document as accurate and complete, thus indicating the document is ready for publication to readers.
- 2. Discuss. To possibly avoid restarting the review and approval process, first consider starting a discussion to resolve issues.
- Revise. Give some suggestions on content or writing style. Track Changes is on, so all edits are tracked.

Upon completing your revision, click **Done Revising**, and then explain your revisions.

4. Decline. When you decline a document, provide a reason.









