PolicyTech® 10.6 Quick Reference — Assignee (formerly Reader)



Access a Document

You can access an assigned document in a number of ways:

- In your email application, open the Required to read or complete message and click the link. You received this email because you were assigned as a reader.
- In PolicyTech, click My Tasks and find the document under Read/Complete.
- Click Documents, then click Browse. For My Relationship, click Documents I Read/Complete, then click OK.
- Click Documents, then click Search. Select Site, My Relationship, and Status options, type search text, then click





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Mark a Document as Read

- 1. Carefully read the document.
- 2. If it's displayed, click the Please Review icon to access Attachments and Changes Summary.
- 3. To read a note from the document owner, click the note icon.
- To make a comment about this document, click then Send Message to Owner.
- 5. When you have read and understood the document and its supplementary materials, click **Mark as Read**.
- 6. If asked for your user name and password, provide them.
- 7. If a questionnaire is included with this document, click **Take Questionnaire** and answer the questions.







SIGN HERE			
Username			
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Take Questionnaire