

# POLICYTECH HELP: APPROVER

This help document covers how to approve documents in Yale’s PolicyTech application tool. Its intended audience is the licensed users who are assigned as approvers and are responsible for approving policies, procedures, and guidelines related to the Yale School of Medicine.

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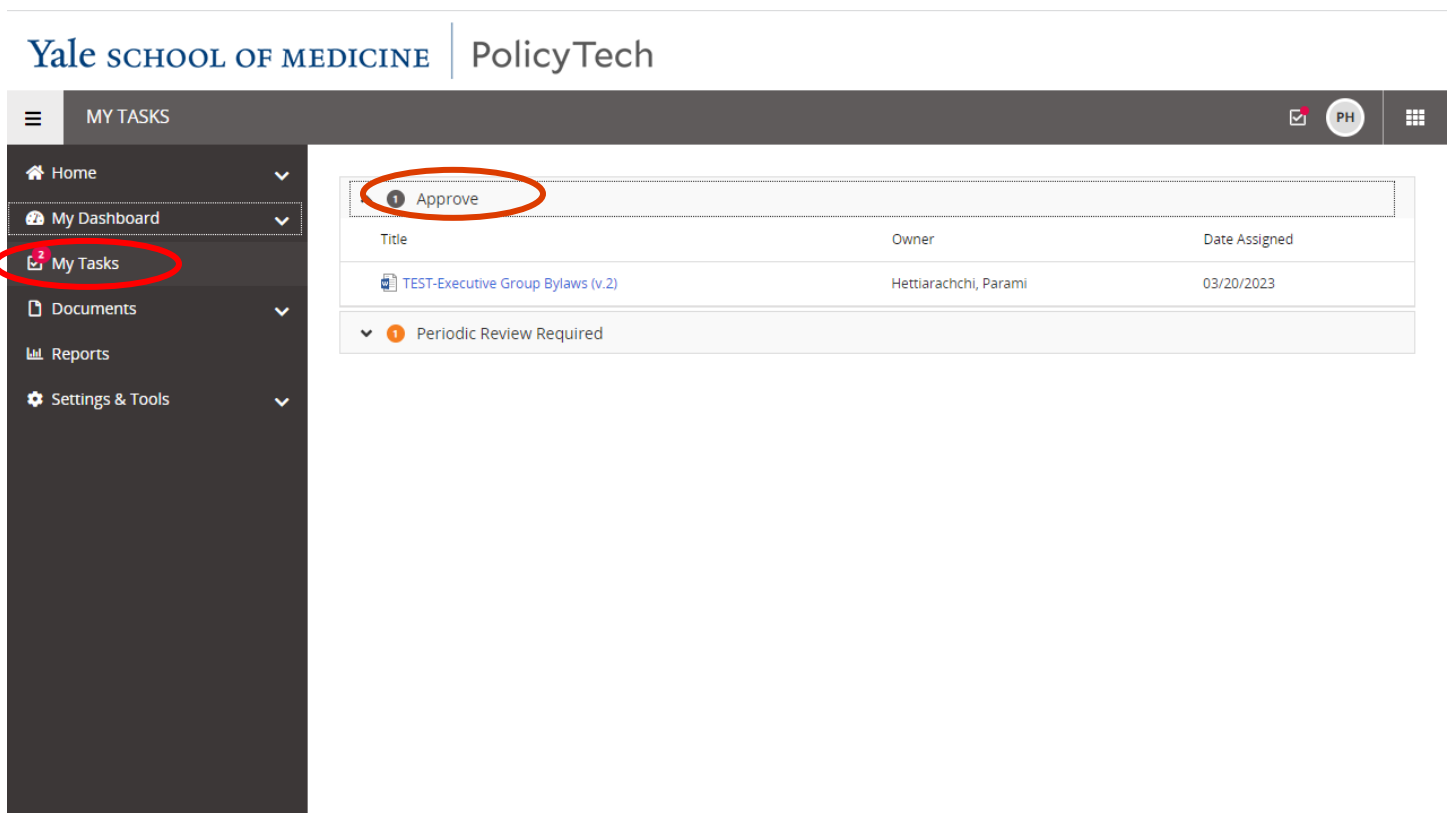
# LOGIN

To start the drafting process, first visit [YSM PolicyTech Website](#) and log in using your NetID and password.

# DOCUMENT SELECTION

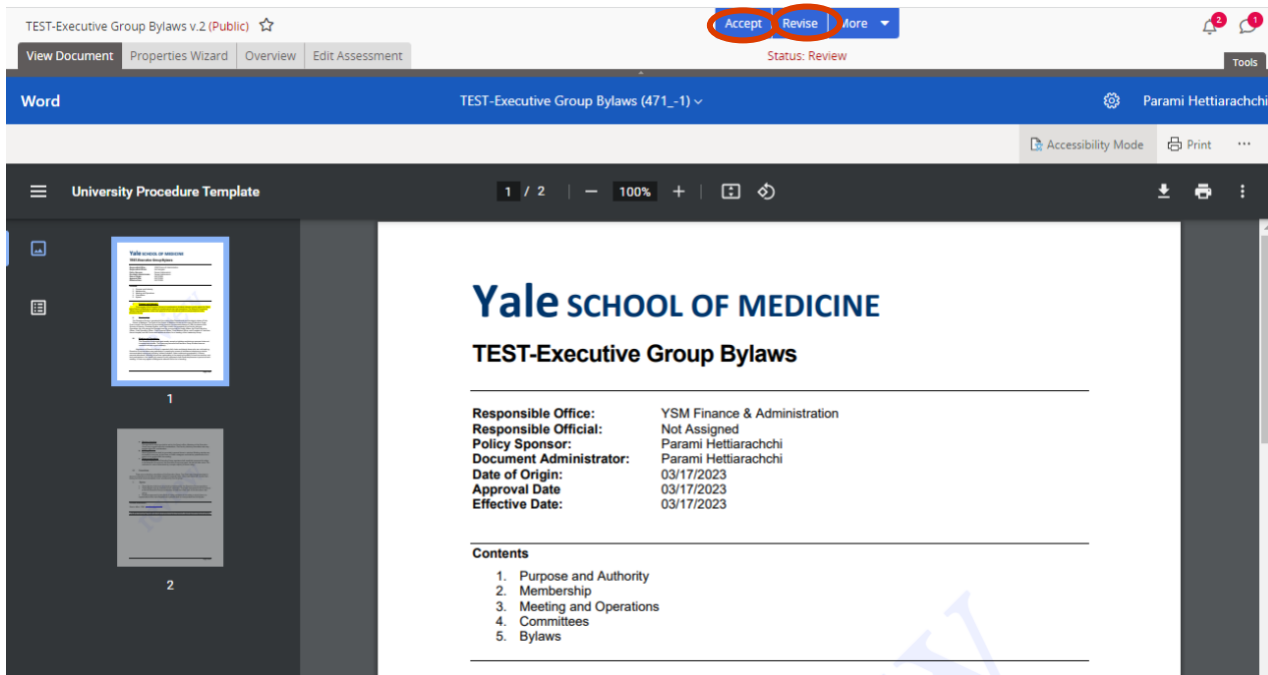
To access the document you want to approve, first, click on "My Tasks" located on the left-hand side navigation bar. Then, under the "Approve" section in the middle window, locate the desired document. Finally, select the document's title to open it.

Alternatively, you can select the document to approve by clicking the link in the email that was sent to you as a task notification.



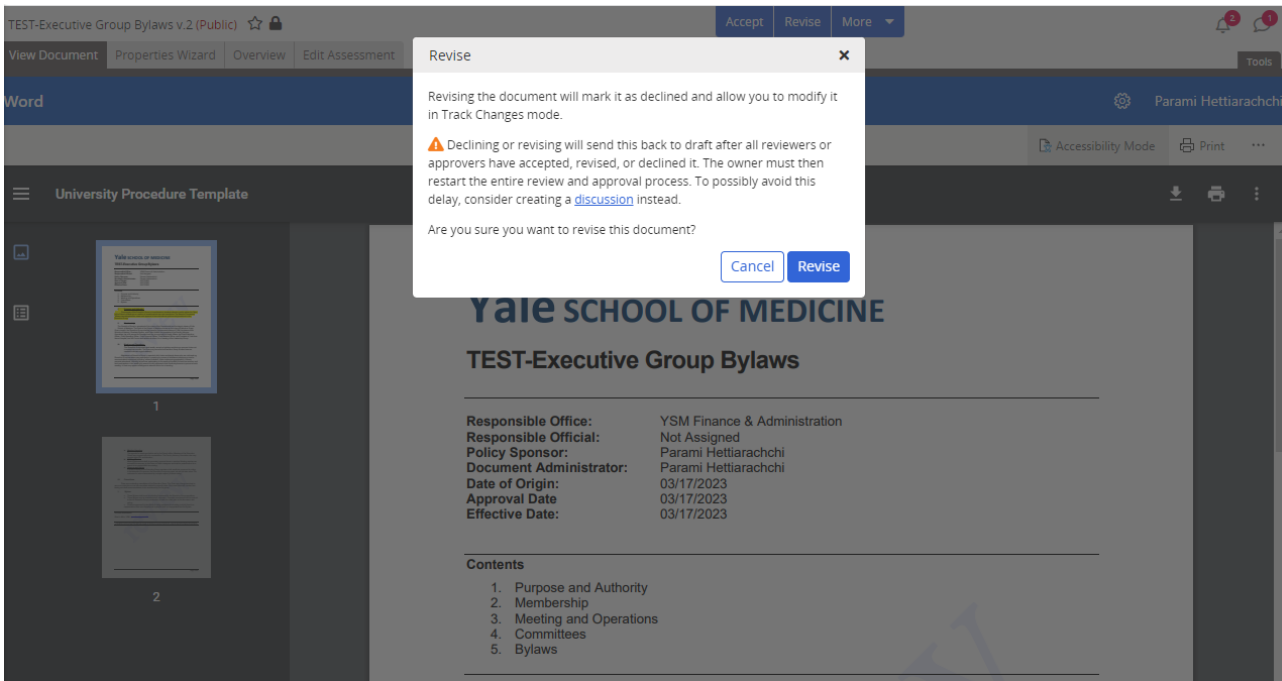
# ACCEPT OR REVISE

A preview of the policy document will then display in your web browser. From here, you may scroll through and review the document. You then have two options. You may: (A) select the "Accept" button at the top to approve it, and the document will close; or (B) select the "Revise" button, which will allow you to edit the document.



## REVISE

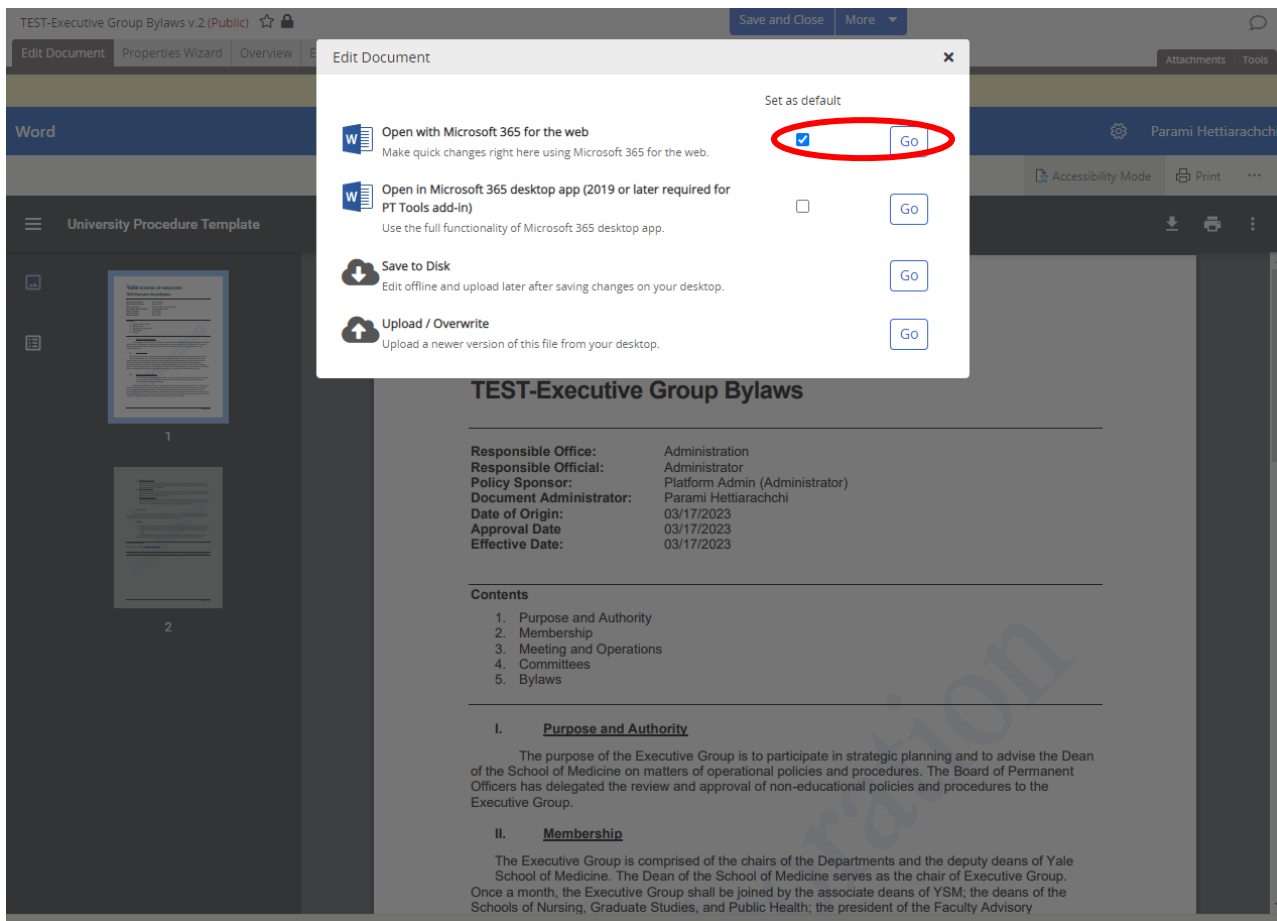
Once you click on the "revise" button, a pop-up window will appear informing you that the document will be marked as declined. You should then click on the "revise" button to continue.



## MICROSOFT WORD 365 WEB VERSION

A preview of the document will then display in your web browser. To edit it, select the "Edit Document" button. This should default to opening the document in Microsoft Word's 365 web version. You may then edit the document as necessary, inserting comments where appropriate to explain your changes or pose questions or concerns.

Please Note: The first time you open a document in PolicyTech you will need to set default options. When prompted, check the "Set as Default" checkbox next to "Open in Microsoft 365 for the web." Then, select the "Go" button to the right.

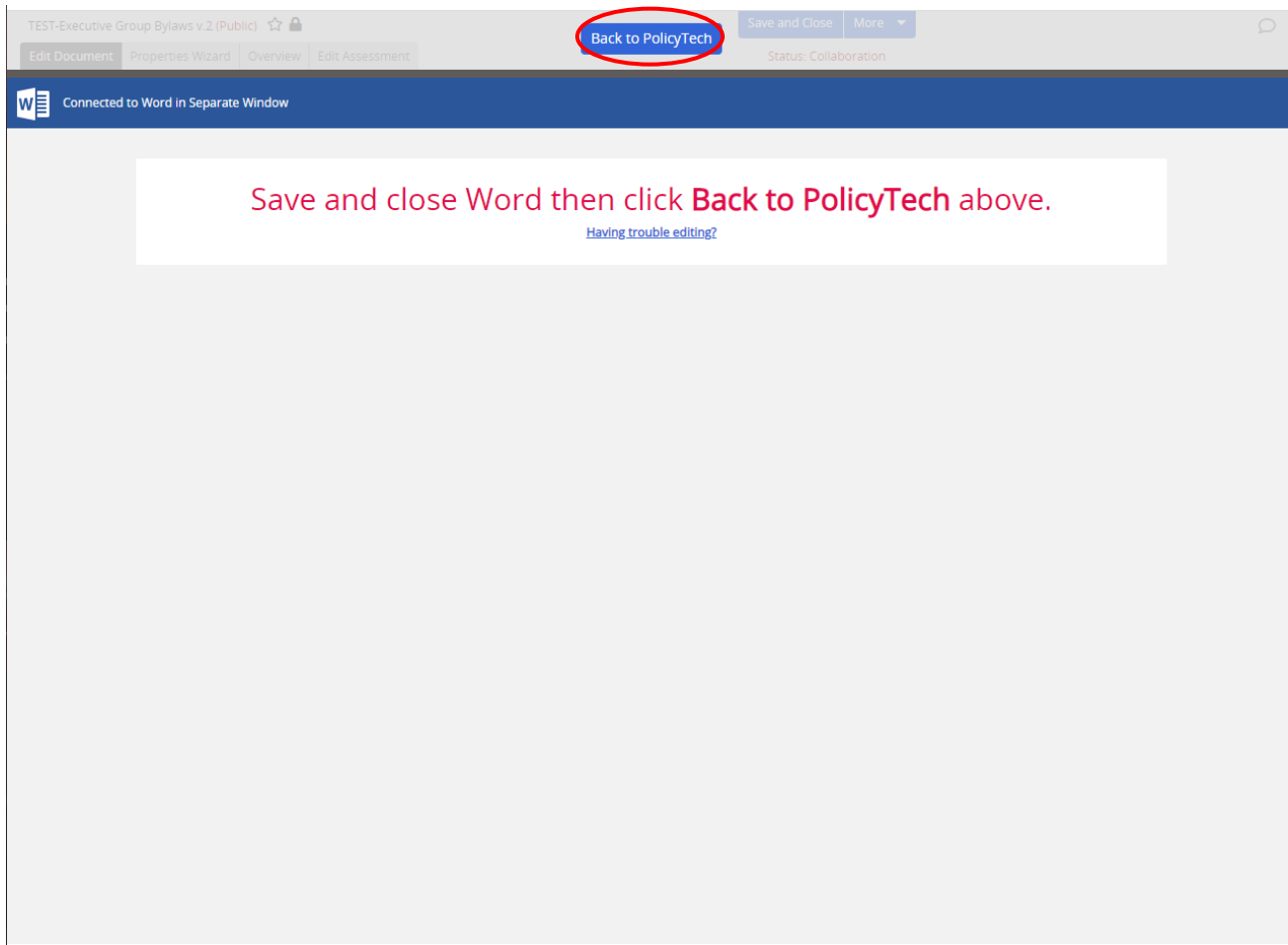


By accessing the web version of the document, several writers/reviewers/approvers can collaborate and edit the document simultaneously, with changes being saved automatically. After completing the editing, click the "go back" button to return to the preview page.

## MICROSOFT WORD 365 DESKTOP APPLICATION

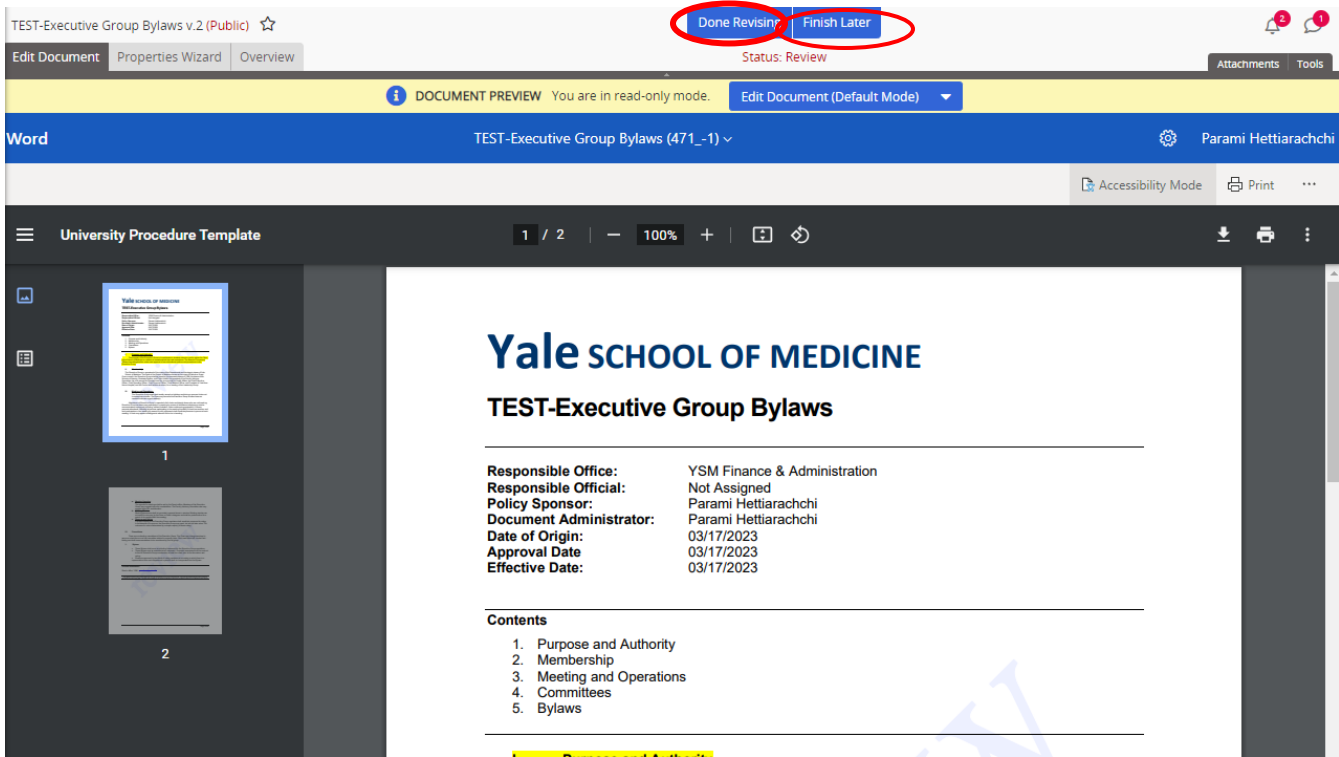
Alternatively, users have the option to open the document with the Microsoft 365 desktop application, which will result the document to open in a separate Microsoft Word window.

After finishing the edits, save and close the Word document to exit and return to the web browser. You should receive a message similar to the following: "Save and close Word then click Back to PolicyTech above." Click on the "Back to PolicyTech" button to go back to the preview page.



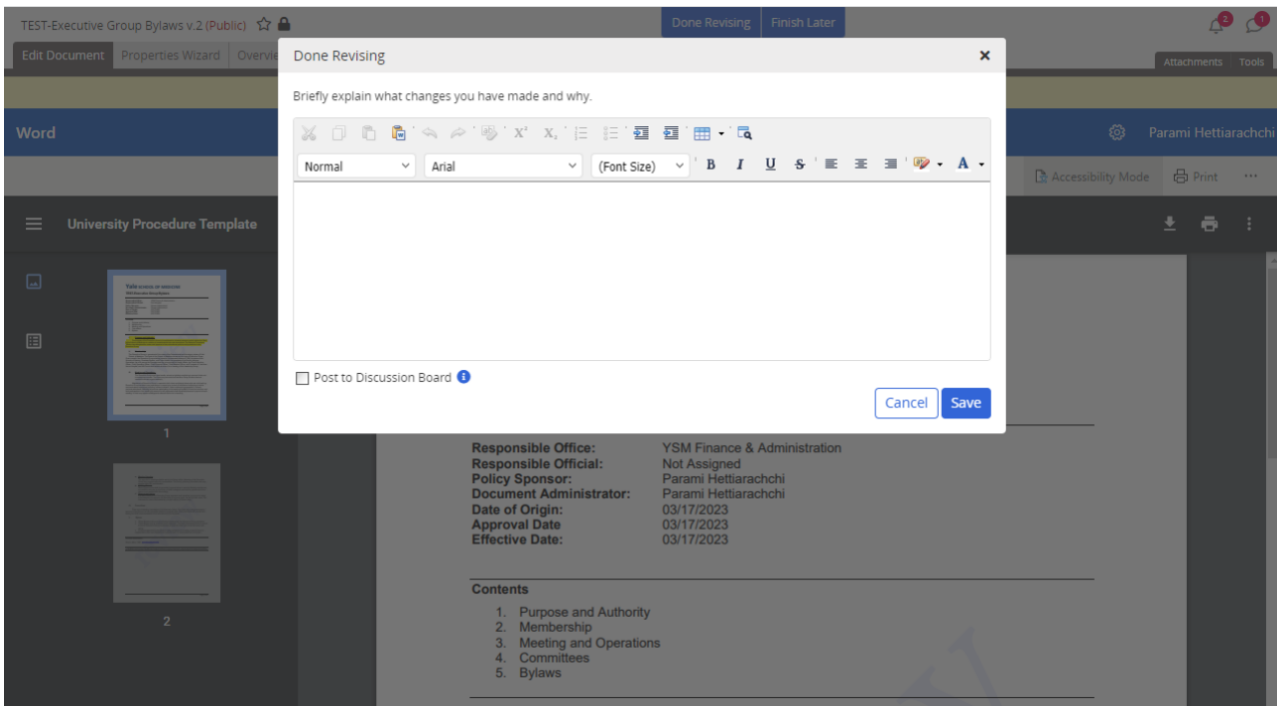
## CLOSE

Next, you have two choices: (A) if you have completed all of your edits on the document, click on the "Done Revising" button located at the top of your window, or (B) if you want to save your progress but resume editing the document at a later time, choose the "Finish Later" button instead. If you select "Finish Later," you will be taken back to your "My Tasks" list, and you will not need to follow the subsequent steps.

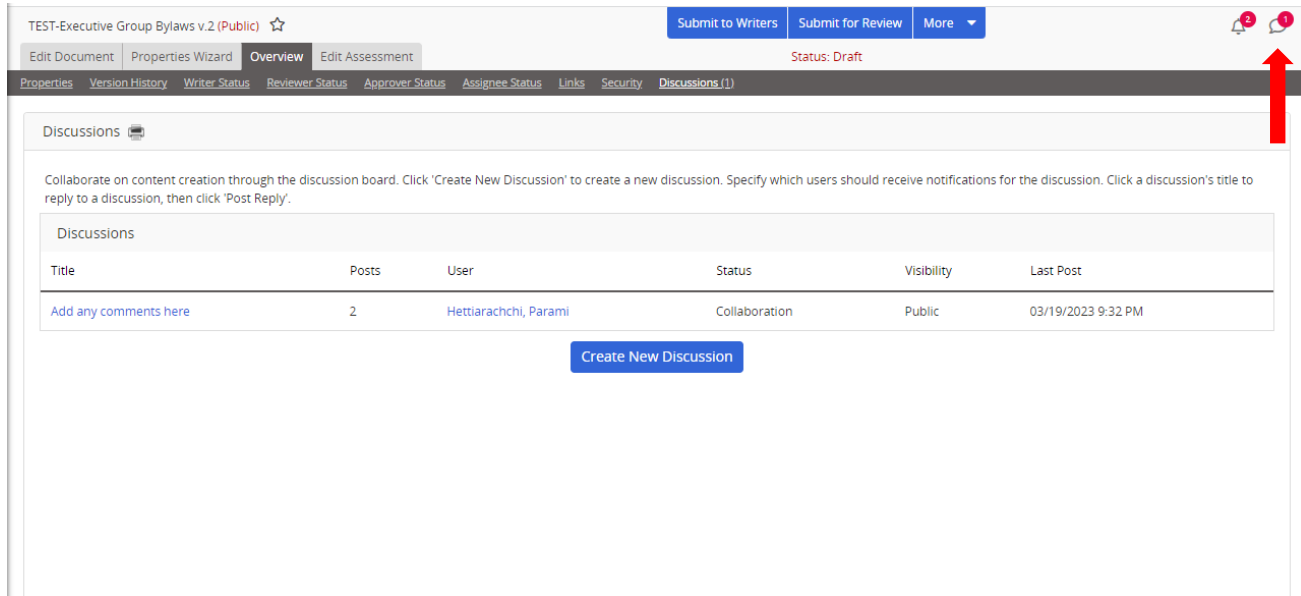


## COMMENT

Once you select “Done Revising”, type in any comments in the small window that appears and then click on “Save.” The document will then be marked as “approved” in the workflow.

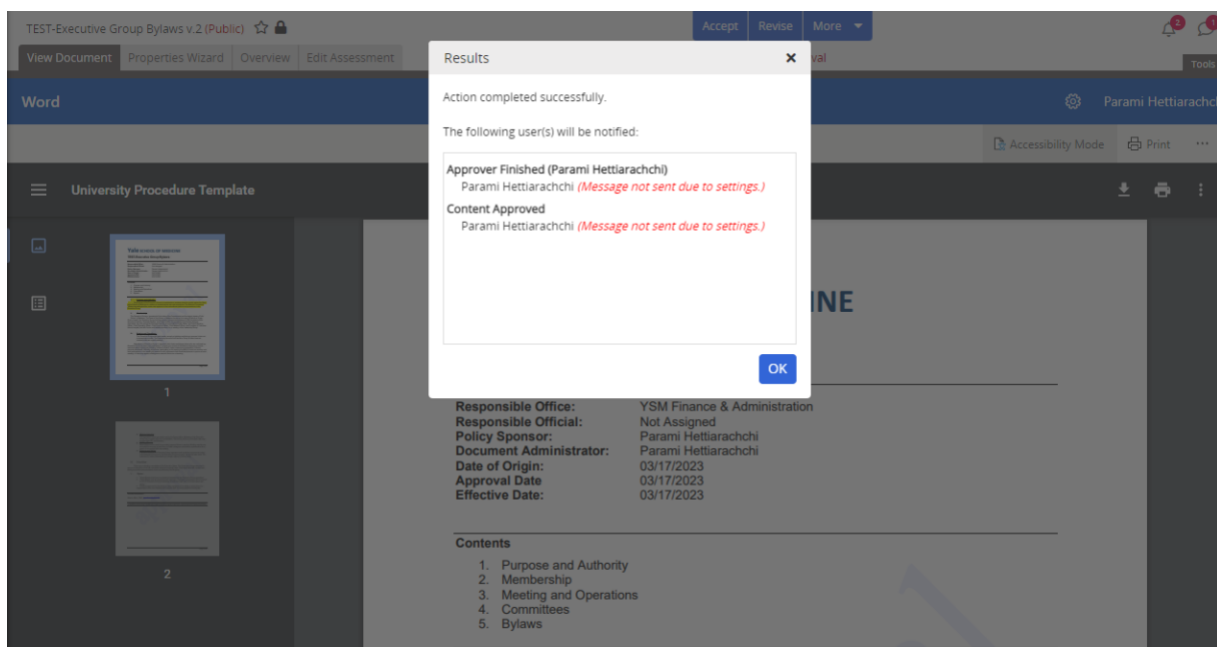


Note: To add what you wrote to this document's discussion board where all assignees (writers/reviewers/approvers) can see it, click Post to Discussion Board. This allows for recipients to reply to your comments and for those 'discussions' to be stored with the content. Discussions can help clarify questions without having to go through another workflow cycle. Click on the Discussions link when viewing content to view and reply to discussions.



## CONFIRM

Finally, a small window will appear, verifying who will receive notifications and who will not. Click on "Save" again, and the tab or window displaying the document should close.





Congratulations! You have successfully approved a document in PolicyTech.

## USING POLICYTECH HELP

You can find answers to many of your questions by using the Help feature in the PolicyTech application. In the upper right corner, click your username, and then click "Help". Browse the table of contents or search for a specific topic.

The screenshot displays the PolicyTech application interface. At the top left, the Yale School of Medicine logo and the text "PolicyTech" are visible. Below this is a navigation bar with a "BROWSE" button and a user profile icon labeled "PH". A dropdown menu is open from the user profile icon, showing options: "My Profile", "Application Settings", "Help" (highlighted with a red circle), and "Sign Out".

The main content area is divided into a left sidebar and a main panel. The sidebar contains a "Documents" section with a search bar and a list of categories including "All Documents by Type (205)", "YM Administration (69)", "YM Practice Standards (14)", "Education (67)", "Faculty (1)", "Finance & Administration (44)", "Governance (8)", and "Research".

The main panel displays a table of documents. The table has columns for "Type", "Title", and "Actions". The "Actions" column includes a document icon, a three-dot menu, a count, and a status (e.g., "Published").

Type	Title	Actions
	Broken Payment Arrangement Letter	... 1 Published
	Chaperones Policy-Reporting Questionable Behavior	... 1 Published
	Deferred Action for Childhood Arrivals (DACA) Policy	... 1 Published
	EPIC - Documenting the Use of Chaperones for Radiology	... 1 Published
	Equal Opportunity Statement	... 1 Published
	Financial Hardship Federal Poverty Guidelines	... 2 Published
	Medical Student Clerkship Evaluation Form	... 1 Published
	Medical Student Elective-Sub-Internship Evaluation Form	... 1 Published
	Program and Center Naming Conventions and Guidelines for YSM & YM	... 1 Published

At the bottom of the main panel, it says "Page 1 of 5 (230 items)" with navigation arrows. In the bottom right corner, there is a blue circular help icon with a white question mark.