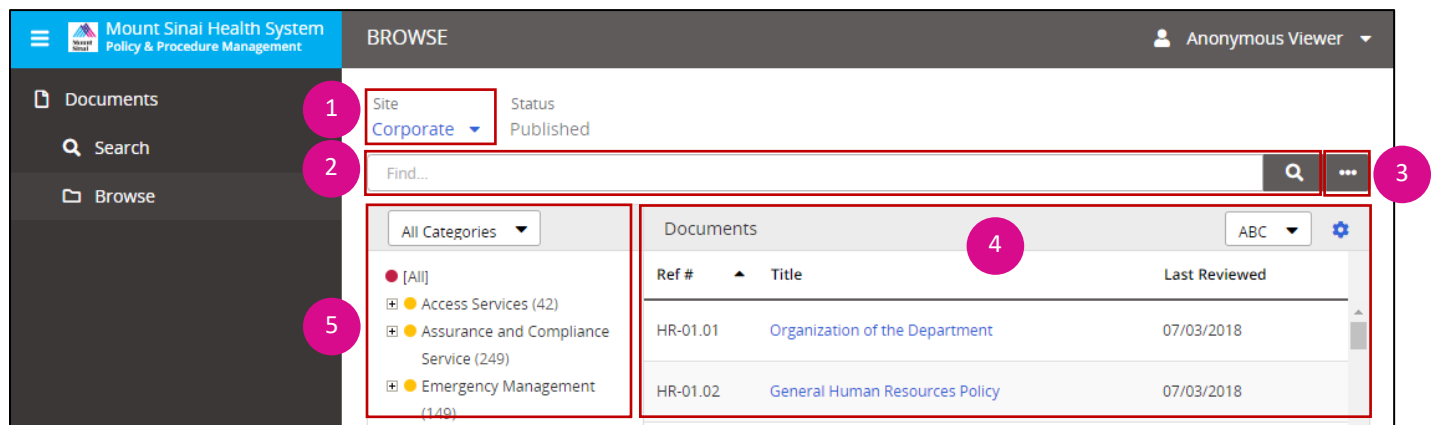# PolicyTech Quick Reference Guide: Access and Search Policies

The Mount Sinai Health System uses NavexGlobal's PolicyTech ® as the central repository for policies, including System-wide corporate and hospital specific policies.

Access PolicyTech

Type of Access	Desktop App Launcher Icon	Web Address
Read-only access (no login needed) *Must be onsite at MSHS location or VPN remote desktop	PT PolicyTech Policies	**https://mshs.policytech.com/?anonymous=true&siteid=1**
Login with MSHS network credentials (single sign-on) *Must use if performing a document task <u>OR</u> on VPN without remote desktop	PT PolicyTech Management	**https://mshs.policytech.com**

Search for a Document

1	**SITE**: Click the drop down menu to select the MSHS site(s) to search within for documents.
2	**FIND**: Enter the search words and click Enter or [🔍]. The system default is to search within the document Title and Reference/Policy #.
3	**CHANGE SEARCH:** You can refine the search options by clicking on [•••] . *Note: Adjusting the selection under "Search Field" will also allow you to further expand your document search (i.e. title, full text, keywords, reference #, all of the above). "Limit find to selected item in arrangement," when checked, only searches within the folder selected. Unchecked, all content in the site will be searched.*
4	**DOCUMENTS:** The search returns a list of all documents, if any, that contain the search word(s) within the fields that were selected. You can sort the document list by clicking on the header column you want to sort by (Ref #, Title, etc.) **VIEW** – Click the title of the document; it will open in a new window as read-only. To **PRINT** the document, select the print icon [🖨] . To **SAVE** the document, click on the download icon [⬇] <u>OR</u> click [🖨] and select Save as PDF from Printer Destination.
5	**BROWSE MANUALS (CATEGORIES):** Expand the contents of manuals and submanuals by clicking on the [+]. Click on the name of the manual or submanual you want to open and the list of documents will be displayed.