

POLICYSTAT IMPLEMENTATION DASHBOARD PROCEDURES

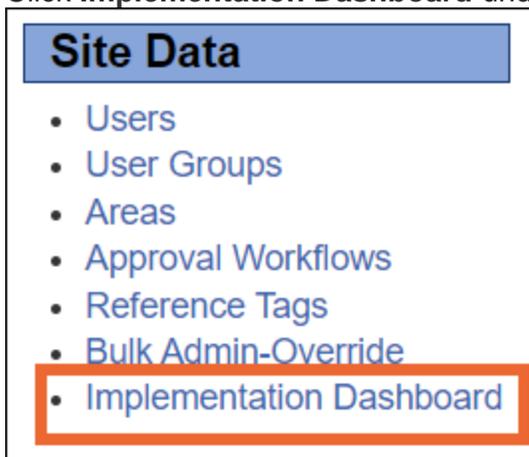
Locate the Implementation Dashboard

1. Click the **Admin** tab along the top left area of your local PolicyStat site.



- If no Admin tab is present, ensure:
 1. You are logged in to PolicyStat as a [User](#), not a guest.
 2. Your account features elevated permissions as a [Site Administrator](#).
 3. Contact your local [Site Administrator](#) with questions.

2. Click **Implementation Dashboard** under the **Site Data** column.



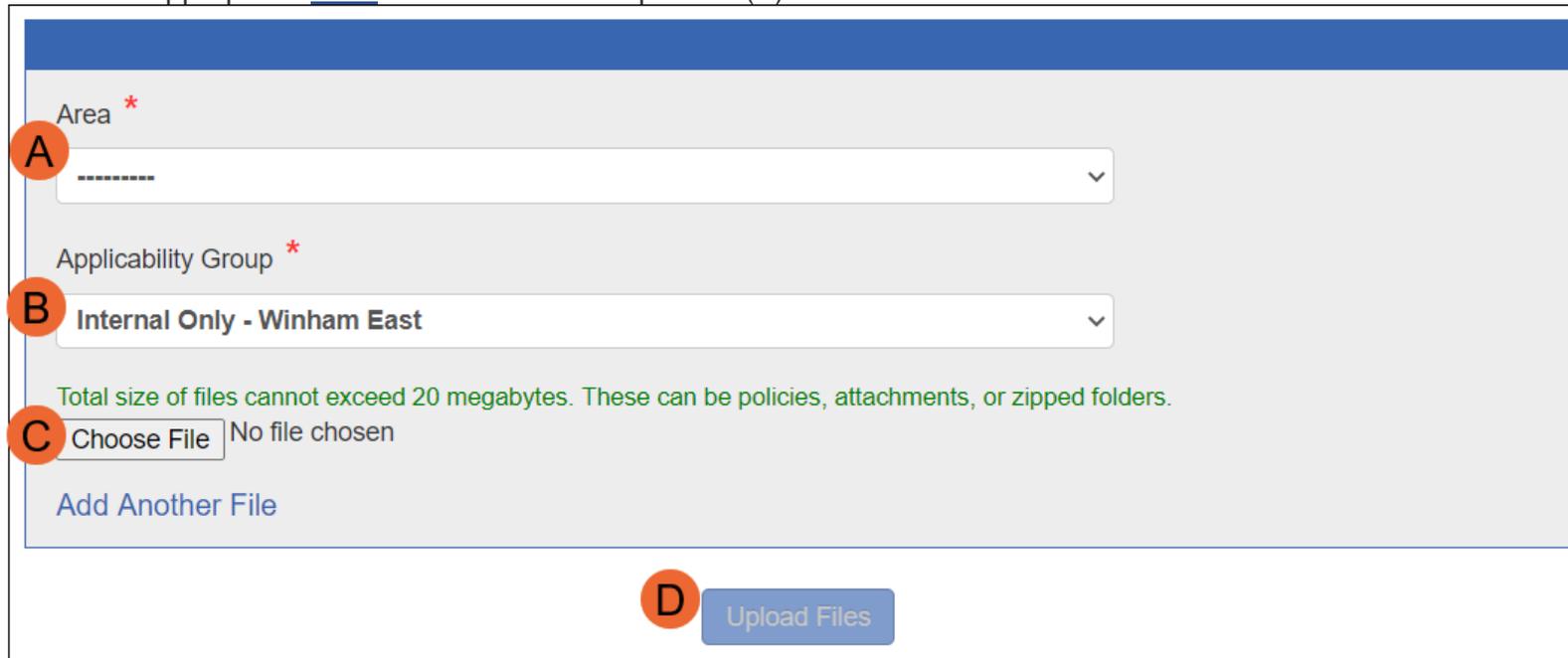
Step 1: Upload Files

1. Click the **Upload Files** link in the header.



« previous step **1. Upload Files** 2. Assign Attachments 3. Set Properties 4. Submit Uploads 5. Resolve Duplicates next step »

2. Select the appropriate **Area*** from the initial drop down (A).



Area *

A

Applicability Group *

B Internal Only - Winham East

Total size of files cannot exceed 20 megabytes. These can be policies, attachments, or zipped folders.

C Choose File No file chosen

Add Another File

D Upload Files

3. If applicable, select the appropriate **Applicability Group** (B).
4. Click the **Browse** button to locate the file** for upload (C).
5. Click the **Upload Files** button (D).

Step 2: Assign Attachments

1. Click the **Assign Attachments** link in the header or ensure the progress bar shows your status as **Assign Attachments**.



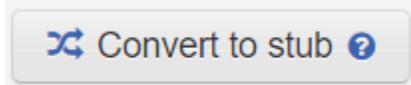
- If you have just completed Step 1, you will navigate to Step 2 automatically.
2. Review the uploaded files and identify any items to mark as attachments.
 3. Click the **Mark as Attachment** button next to any files identified as attachments.



- Files that are incorrectly added as attachments can be [Marked as a Policy](#).
4. Locate the parent file the attachments belong to.
 5. Click the **Attach Files** button next to the parent file.



6. Click the drop-down list to locate the appropriate attachment.
7. Click the **Attach** button.
 - To remove an attachment, click the **X** next to the title.
8. Click the **Convert to Stub** button to mark a file as a [stub policy](#).



9. Ensure the **Files to Attach** section is clear of any remaining attachments or [stub policies](#) before proceeding.
10. Click **3. Set Properties** on the header to proceed.

Stub Policies

Some files are not independent policies, but also are not associated with a parent document. In PolicyStat, these files can become stand-alone attachments called "stub" policies.

Examples of stub policies can include the following types of files if they do NOT associate with a parent document:

- Excel forms or log sheets
- Form letters or memos in Word or PDF format
- PowerPoint Presentations
- Any other file format that does not associate directly to a parent document.

When a user clicks a stub policy, the content of the policy reads simply: "Please see the attached file."

Current Status: Active **PolicyStat ID:** 1451835



Origination: 11/5/1978, 12AM EST
Last Approved: 11/5/2014, 12AM EST
Last Revised: 11/5/2015, 12AM EST
Next Review: 11/4/2016, 12AM EDT
Owner: Kay Smith: Director of Nursing (DON)
Area: Nursing Directives
References:

stub-spreadsheet stub policy

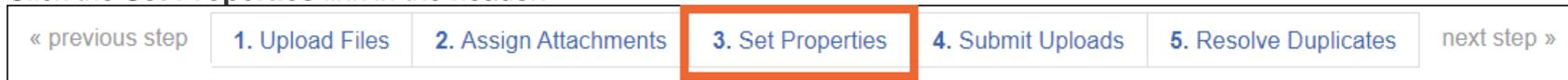
Please see the attached file.

All revision dates: 11/5/2015, 12AM EST

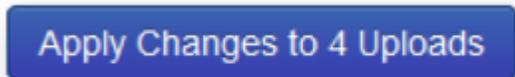
Attachments: 

Step 3: Set Properties

1. Click the **Set Properties** link in the header.



2. Click the checkboxes next to the file names to select the files and assign properties.
 - Files can be selected one at a time, multiple non-sequential files, or all displayed files (click the checkbox at the top left of the table to select all).
3. Use the drop-down lists or text entry boxes to designate the appropriate properties (Area, Approval Workflow, Policy Owner, Review Period)
4. Click **Apply Changes** to assign the properties.



- Changes can be modified prior to submitting if necessary.
- As needed, delete any file uploads by selecting and clicking **Delete Uploads** (next to **Apply Changes**).



5. Click **4. Submit Uploads** on the header to proceed

Step 4: Submit Uploads

1. Click the **Submit Uploads** link in the header.



2. Review the uploaded files and identify any items to mark as attachments.
3. Click the checkbox in the top left of the table to select all uploads.
4. Using Select All selects a maximum of 50 files. If uploading more than 50, click **Select All Uploads**.
5. Click the **Submit Uploads** button at the top or bottom of the table.
6. Click **5. Resolve Duplicates** on the header.

Step 5: Resolve Duplicates

1. Click the **Resolve Duplicates** link in the header.



2. Click the **file name** to download, open, and review the original file.

Actions	Why?	Name	Area	Uploaded	Filename	Uploaded By	Status
 	Identical titles	Activities of Daily Living	Training	7/24/2020, 8:13AM EDT	Activities of Daily Living.doc	Munro, Sean	Submitted
		Activities of Daily Living	Training	7/22/2020, 8:01AM EDT	Activities of Daily Living.doc	Munro, Sean	Submitted

3. Determine if the files are duplicates.

4. Click **Mark not a duplicate** or **Delete**, depending on if the file is a duplicate or not.

Actions	Why?	Name	Area	Uploaded	Filename	Uploaded By	Status
 	Identical titles	Activities of Daily Living	Training	7/24/2020, 8:13AM EDT	Activities of Daily Living.doc	Munro, Sean	Submitted
		Activities of Daily Living	Training	7/22/2020, 8:01AM EDT	Activities of Daily Living.doc	Munro, Sean	Submitted

5. Repeat the action as necessary for each item flagged as a potential duplicate.

6. If the Delete option is grayed out, as seen below:

Actions	Why?	Name	Area	U
 	Identical titles	COVID-19		8
		COVID-19		6

The document(s) listed already completed the conversion process and must be resolved on your Duplicates page. See this article for more information: [How Do I Check for Duplicate Policies?](#)

For additional help, visit hub.rldatix.com/SupportHUB.

To participate in upcoming Education session, visit our [Webinar Calendar](#) to sign-up. Visit our [Education pages](#) to view training content any time.