

## Implementation Dashboard – Step 2: Assign Attachments

To begin, navigate to the Admin tab. Click the Implementation Dashboard link.

Click Assign Attachments in the top bar. If you have just finished Step 1 Upload Files, the system will navigate to Step 2 automatically.

If no attachments are included in your upload set, progress to Step 3 by clicking the link, otherwise, locate and mark any attachments. We recommend including the term “attachment” in the file name to make them easy to identify.

Click the corresponding Mark as Attachment button to the left of the file name. The file is now recognized as an attachment by the system.

Locate the desired policy from the list of files and click attach files.

Select the attachment from the dropdown list and click Attach.

Policies can have more than one attachment. Repeat the process as many times as needed. Click the X next to an attachment to remove it.

Some files are not independent policies but are also not associated with another document. In PolicyStat, these files can become stand-alone attachments referred to as stub policies.

Examples of stub policies, which are not associated with another document, can include spreadsheets, presentations, and even PDFs. When a user opens a stub policy, the content will simply state “Please see the attached file.”

Click the Convert to Stub button to indicate a file is a stub policy.

Ensure all attachments are marked and attached or converted to stubs before proceeding to Step 3 where properties are assigned.