

PolicyStat Quick Reference Links

Topic	Overview	Knowledge base article
Terminology	Common terms and topics	What Terms are Used in PolicyStat?
3 Pillars of PolicyStat	1. User roles 2. Policy Areas 3. Approval Workflows	What are the core concepts of PolicyStat?
Searching	• Search field returns Google-like search results • Tabs are filters to narrow search results	How do I Search for Policies?
User Notifications	• User receives email to notify need for action/review • Home tab screens • Notifications tab (top right)	How Does PolicyStat Alert Users?
Document Life Cycle	1. Draft 2. Pending 3. Active	What does the document life cycle look like?
Approval Workflows	Sequence of users who review, edit, and approve a PolicyStat document as required by the assigned revision period or edits	What are Approval Workflows?
Policies Requiring Approval	• Bulk Approve (Only if changed) • Approve/Reject one by one • Show Changes to review	How do I Approve a Pending Policy? How do I Edit a Pending Document?
Collaboration and Commenting	Allow users who are not a part of the Approval Workflow to comment and suggested changes, inviting comments requires a PolicyStat account.	Can I Invite Others to Collaborate on a Policy?
Reviewing Policies	• Edit to review or start a new draft • Policy Content Tab • Policy Properties Tab • Policy Applicability Tab (if applicable)	How do I Edit or make Revision to an Existing Policy?



Create New Policy	- Create new document using PolicyStat Editor - Upload from existing Word document	How do I Create a New Policy?
Attachments / Images	Common attachment types: Spreadsheets, PowerPoints, PDF, images	Attachments and Images

**Terminology may vary based on local preferences.*

Toolbar Overview

Editor

ExportImport

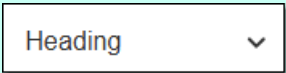
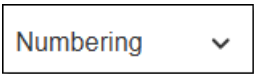
Heading

Numbering





The Toolbar features many buttons and functions with which you may already be familiar. For a full breakdown of the Toolbar options with examples, [see this article](#).

Toolbar Icon	Description	Example
	Formatting options to change paragraph and headings	Normal Paragraph text Heading Text
	Change list numbering style	1. 2. 3. A. 1. a. 1.
    	- Create a link to a webpage or file - Link to a specific heading - Create a clickable phone number - Add an Anchor tag (jump to a specific location in a policy)	www.rldatix.com Refer to the article on our Support Portal .



	1. Insert an online Image 2. Insert a table 3. Insert Horizontal Line across the content 4. Insert Symbol 5. Insert page break (on the printed PDF)	Divide sections with a line. Symbols: Σ € £ ¥ ≤
	1. Undo the last action(s) taken 2. Redo an undone action.	N/a
 	Content Formatting Options 1. Bold 2. Italics 3. Underline 4. Highlight 5. Subscript 6. Superscript 7. Remove formatting	1. This is the most important text. 2. <i>Slight emphasis</i> is given here. 3. <u>This text</u> could be mistaken for a hyperlink. 4. Highlight text that needs to stand out. 5. C₆H₁₂O₆ the symbol for glucose. 6. This is the 5th item in the list 7. This removes all formatting and resets text back to the default format.
	1. Numbered list 2. Bulleted list 3. Indent 4. Outdent 5. Block Quote 6. Center	1. Numbered list item a. Indent numbered list item • Bulleted list item ○ Indent bulleted list item
	1. Find or Replace a letter, term, or phrase 2. Select All content on the screen	N/a
	View the Source HTML code behind the content	N/a



Editor AI Tools



PolicyGen AI Assistant

The PolicyGen AI Assistant is a generative AI tool designed to help create and update policies quickly, while ensuring they meet the requirements of the policy owner. Instead of starting from scratch, clinical staff can focus on reviewing and refining policies, reducing workload and improving efficiency.

How it Works

1. Policy owner provides key details
2. AI generates a structured, compliant policy draft
3. Policy owner reviews the draft, edits content, and submits for approval

Policy Content Translation

Using PolicyStat AI, you can translate sentences, sections, or even entire policies into other languages. Highlight the content you wish to translate, select your target language from the dropdown, and then choose to insert the translation or replace the original after the process runs.

Available languages include English, British English, Spanish, French, Canadian French, Arabic, and German.

For more information on Editor AI tools, [visit this section of the knowledge base](#).

For additional help, visit the [RLDatix Support Portal](#) or the [RLDatix Public Knowledge Base](#) to view knowledge articles or contact our Support team.

