

How to Update a Document in PolicyTech to the New Template:

1. Download and save the document you want to update from PolicyTech to your desktop. For specific instructions on how to download a PolicyTech document, refer to the guide on [downloading PolicyTech documents](#).
2. After downloading, format the document using the new template. You can do this in one of two ways:

Method 1 - Import the formatting styles from the new template into the downloaded document and apply them (recommended).

Method 2 - Update the formatting manually to match the new template.

Method 1

Importing the formatting styles from the new template into the downloaded document and applying them (recommended).

1. Transfer the styles from the new template to the downloaded document. For detailed, step-by-step instructions on how to import styles, refer to the “[How to transfer styles from one Word document to another](#)” guide.
2. After importing the styles to the document that you want to template, begin re-templating. First, Insert the Yale School of Medicine logo by copying and pasting it. Some published documents has the text file of the Yale School of Medicine logo, so be sure to replace it with this image file.

Yale SCHOOL OF MEDICINE

3. Eliminate any acronyms from the title. The revised title should follow the format of “Title - Type of Document.”
4. Select the title and apply the “Doc Title” style. (Arial 18, Dark Blue, left alignment)
5. Cut the specified items (listed below) from the header and place them at the very end of the document.

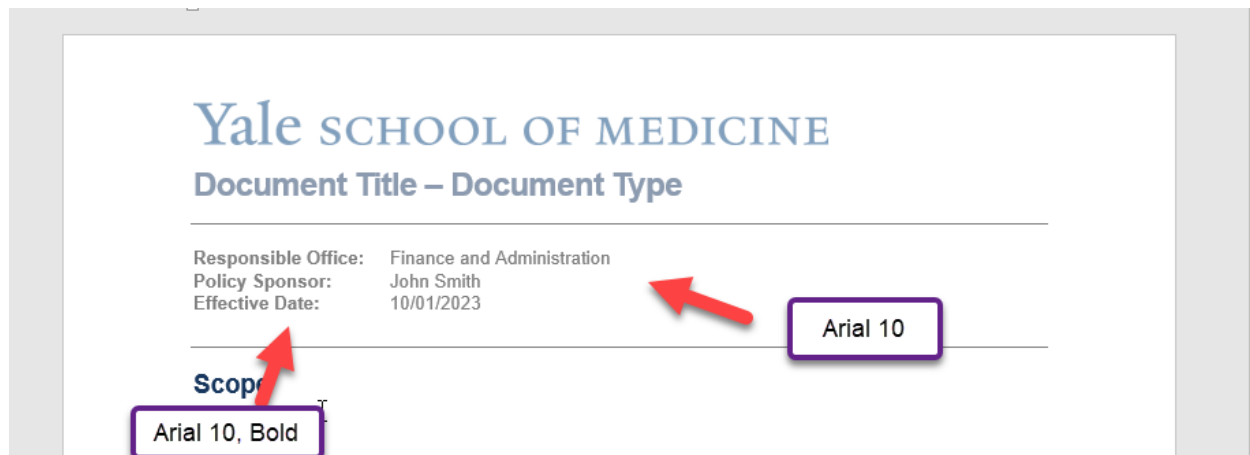
Responsible official:

Document Administrator:

Date of Origin:

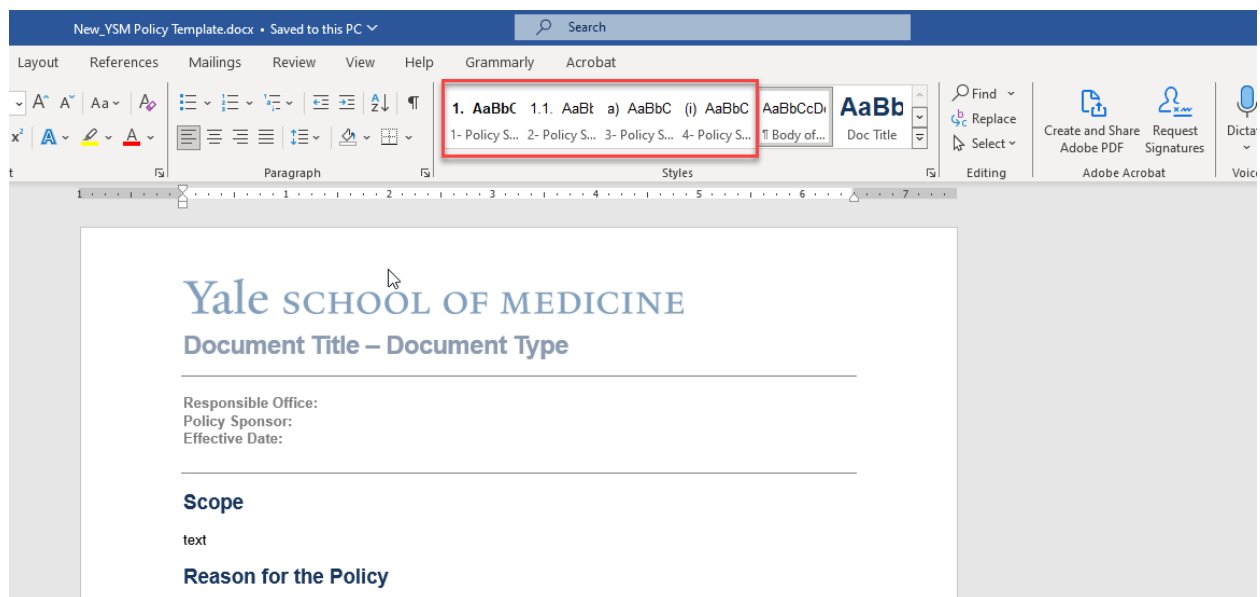
Approval Date:

6. After implementing the changes, the header should be displayed as follows:



7. For the subheadings (Scope, Reasons, Definitions etc.) apply the Section Heading Style. (Arial, 14, Bold, Dark Blue)
8. For the body of the text, apply the style labelled “Body of Paragraph”.
9. Policy/Procedure/Guideline sections should be numbered accordingly. If the document you are templating doesn't include any numbers in the sections area, rather paragraphs, keep it as it is to avoid making any changes to the content. If the document is up for a review, encourage your writers to convert the paragraph format to numbered format for clarity. This numbered format is also useful when referring to different sections of a policy/procedure/ guideline in a newsletter.

To easily apply different number formats to the document, please select one of the four formatting styles included in the styles section.



10. Lastly, ensure that the **version history** and **keywords** are included along with the statement to refer to the online version of the document.

The official version of this information will only be maintained in an on-line web format. Any and all printed copies of this material are dated as of the print date. Please make certain to review the material on-line prior to placing reliance on a dated printed version.

Method 2

1. First, Insert the Yale School of Medicine logo by copying and pasting it. Some published documents have the text file of the Yale School of Medicine logo, so be sure to replace it with this image file.

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2. Eliminate any acronyms from the title. The revised title should follow the format of "Title - Type of Document."
3. Select the title and apply Arial font, size 18, Dark Blue, left alignment.
4. Cut the specified items (listed below) from the header and place them at the very end of the document.

Responsible official:

Document Administrator:

Date of Origin:

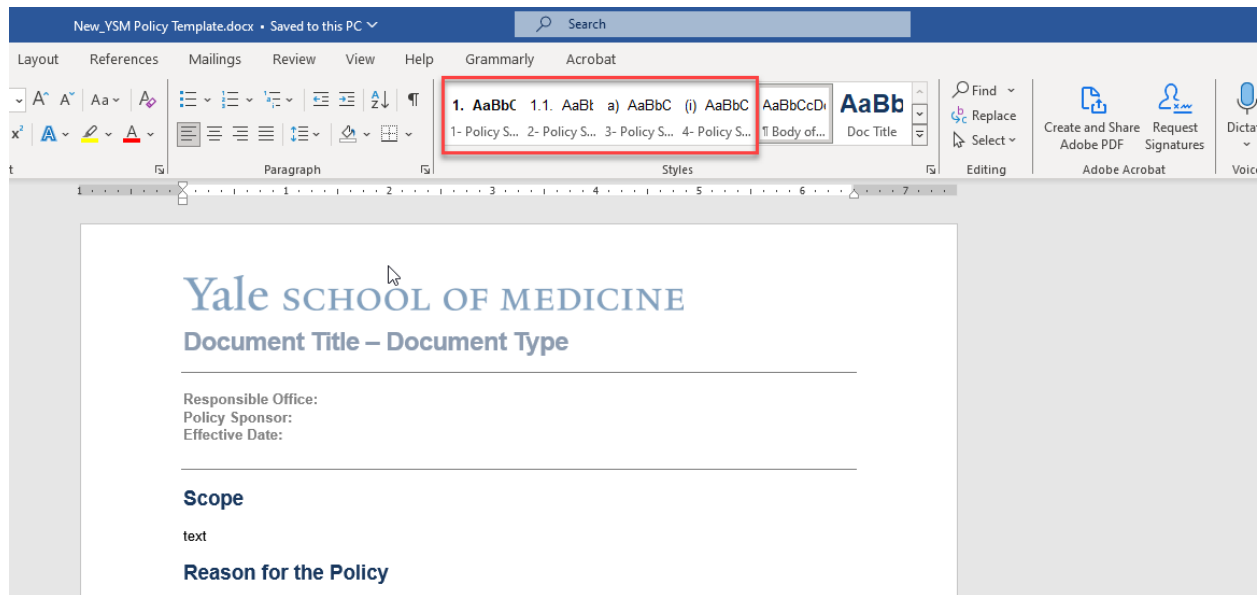
Approval Date:

5. After implementing the changes, the header should be displayed as follows:



6. For the subheadings (Scope, Reasons, Definitions etc.) apply the font Arial, 14, Bold in Dark Blue.
7. For the body of the text, apply font Arial, 10 in Black.
8. Policy/Procedure/Guideline sections should be numbered accordingly. If the document you are templating doesn't include any numbers in the sections area, rather paragraphs, keep it as it is to avoid making any changes to the content. If the document is up for a review, encourage your writers to convert the paragraph format to numbered format for clarity. This numbered format is also useful when referring to different sections of a policy/procedure/ guideline in a newsletter.

To quickly apply different number formats to your document, either choose one of the four formatting styles available in the styles section, if available in your document, or use a pre-designed YSM policy/procedure/guideline template with preset numbering styles to copy and paste your content.



9. Lastly, ensure that the **version history** and **keywords** are included along with the statement to refer to the online version of the document.

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