



YellowFolder

The Education Documentation Experts

Welcome to Edit Document Metadata Training

PNE Name, Paperless Nation Engineer

***Please ensure you have used the phone dial in method for audio for this training.
If you have signed in via your computer audio, please switch to your phone audio.***

Editing Document Metadata



Edit Document Metadata is a tool that **allows you to move documents** from one folder to another, from one person to another, or change the document date.

Edit Document Metadata should be used **when a document has been placed in the wrong document folder or in the wrong person folder**, or when you want to change the date associated with the document.

Editing Document Metadata



support: (844) YELLOW-9

(844) 935-5699

support@yellowfolder.com

Hi, Alex Crampton (acrampton.dms@yellowfolder.com)

Your Access : Archive Admin

Your Title : Full Subscriber

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Search

Advanced Search

Order By

☒ Campus ☐ Name

SR

Active

Anytown Elementary School

A

Abbott, Quentin - 222001234

Attendance

Yearly Attendance Record

Grades And Testing

Legal

Transcript-Permanent

Acosta, Allyson - 222001235

Adams, Guadalupe - 222001236

Andrew, Drake - Drake123

Armstrong, Leslie - 222001243

B



80%



1 / 2



1 / 2



Vaccine Administration Record for Children and Teens

Before administering any vaccines, give copies of all pertinent Vaccine Information Statements (VISs) to the child's parent or legal representative and make sure he/she understands the risks and benefits of the vaccine(s). Always provide or update the patient's personal record card.

Vaccine	Type of Vaccine	Date vaccine given (mo/day/yr)	Funding Source (F/S/F)	Site*	Vaccine	Vaccine Information Statement (VIS)		Vaccinator (signature or initials and title)	
					Lot #	MR	Date on VIS	Date given	
Hepatitis B* (e.g., HepB, Hib-HepB, DTaP-Hib-IPV) Give IM.	HepB	8/2/2010	F	IM/NET	0683M	MMK	7/18/09	8/2/2010	JTA
	Hib-HepB	8/2/2010	F	IM/NET	616A1	QSK	7/18/09	8/2/2010	DGP
	DTaP-Hib-IPV	10/2/2010	F	IM/NET	712A2	QSK	7/18/09	10/2/2010	DGP
	DTaP-Hib-IPV	12/2/2010	F	IM/NET	712A2	QSK	7/18/09	12/2/2010	DGP
	DTaP-Hib-IPV	2/2/2011	F	IM/NET	712A2	QSK	7/18/09	2/2/2011	DGP
Diphtheria, Tetanus, Pertussis* (e.g., DTaP, DTaP/HiB, DTaP-Hib-IPV, DT, DTaP-IPV/HiB, DTaP-IPV, Tdap, Td) Give IM.*	DTaP	8/2/2010	F	IM/NET	712A2	QSK	7/18/09	8/2/2010	DGP
	DTaP	10/2/2010	F	IM/NET	712A2	QSK	7/18/09	10/2/2010	DGP
	DTaP	12/2/2010	F	IM/NET	712A2	QSK	7/18/09	12/2/2010	DGP
	DTaP	2/2/2011	F	IM/NET	712A2	QSK	7/18/09	2/2/2011	DGP
	DTaP	4/2/2011	F	IM/NET	712A2	QSK	7/18/09	4/2/2011	DGP
Haemophilus influenzae type b* (e.g., Hib, Hib-HepB, DTaP-IPV/HiB, DTaP/HiB, Hib-MenCIV) Give IM.*	Hib	8/2/2010	F	IM/NET	2432L	MSB	12/16/08	8/2/2010	DGP
	Hib	10/2/2010	F	IM/NET	2432L	MSB	12/16/08	10/2/2010	DGP
	Hib	12/2/2010	F	IM/NET	2432L	MSB	12/16/08	12/2/2010	DGP
	Hib	2/2/2011	F	IM/NET	2432L	MSB	12/16/08	2/2/2011	DGP
Polio* (e.g., IPV, DTaP-Hib-IPV, DTaP-IPV/HiB, DTaP-IPV) Give IPV Subcut or IM.*	IPV	8/2/2010	F	IM/NET	1543L	MSB	12/16/08	8/2/2010	DGP
	DTaP-Hib-IPV	10/2/2010	F	IM/NET	712A2	QSK	7/18/09	10/2/2010	DGP
	DTaP-IPV/HiB	12/2/2010	F	IM/NET	712A2	QSK	7/18/09	12/2/2010	DGP
	DTaP-IPV/HiB	2/2/2011	F	IM/NET	712A2	QSK	7/18/09	2/2/2011	DGP
	DTaP-IPV/HiB	4/2/2011	F	IM/NET	712A2	QSK	7/18/09	4/2/2011	DGP
Pneumococcal (e.g., PCV7, PCV13)	PCV7	8/2/2010	F	IM/NET	74505-05A	WYE	4/16/10	8/2/2010	DGP
	PCV13	10/2/2010	F	IM/NET	74505-05A	WYE	4/16/10	10/2/2010	DGP

Patient name: Quentin Aaron Abbott

Birthdate: 2/1/2010 Chart number: page 1 of 2

practice name and address:
Metropolitan Pediatrics
4327 Angew Lane
Big City, AB 02367

Split Document

Share Document

View Document

Download Document

Edit Document Metadata

Document Metadata

First Name: Quentin

Middle: Aaron

Editing document metadata is located on the right panel when viewing the document list or with a file open.

Editing Document Metadata



Clicking on the metadata tab will open the following pop-up.

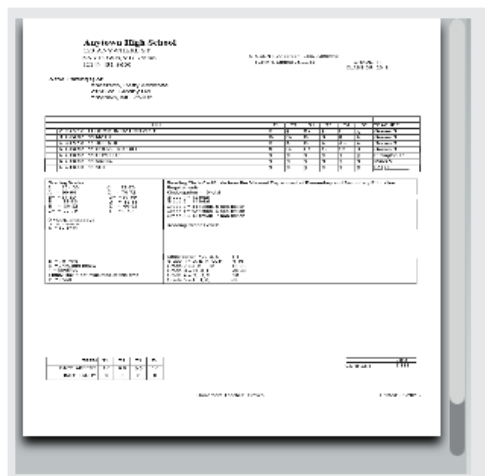
From here, you can edit:

- Person Data (the person the document belongs to)
- Document Type (the folder the document belongs in)
- Document Date (the date associated with the document)

Edit Document Metadata



Report Cards Anderson, Betty 222001240.pdf



Record Series :

SR

Person Data :

Betty Anderson



Document Type :

Report Cards



Document Date :

05-22-2013



Update

Cancel

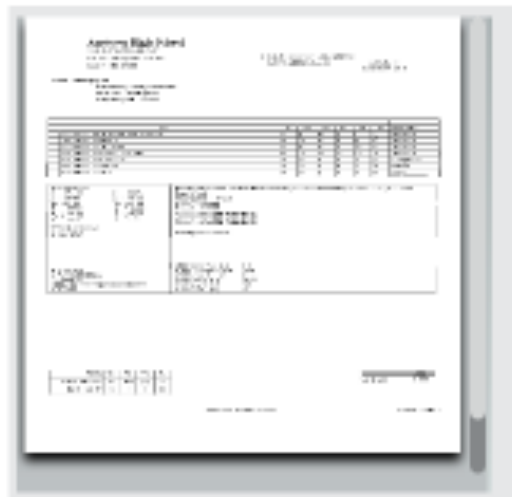
Editing Person Data



Edit Document Metadata



Report Cards Anderson, Betty 222001240.pdf



Record Series :

SR

Person Data :

Document Type :

Document Date :

smith

FN: Bobbi	DOB: 06/13/2010
LN: Smith	GD: null
ID: 222001630	WD: null
Status: Active	
FN: Bob	DOB: null
LN: Smith	GD: null
ID: 987654321	WD: null
Status: Active	
FN: Jeff	DOB: null


Typing the employee/student name will bring up options from the latest updated employee/student list

Editing Document Type



Edit Document Metadata X

Report Cards Anderson, Betty 222001240.pdf



Record Series : SR

Person Data : Betty Anderson X

Document Type : Report Cards ▼

Document Date :

- 504-A
- ACT
- Application For Benefits
- Application for Pre-K
- Application for Student Transfer
- ASVAB
- At Risk Form
- Birth Certificate**
- Correspondence Related to Health Issues
- Court Orders
- OPS
- Cumulative Folder Checklist
- Cumulative Health Card or Record
- Email
- EOC

The Document types listed are the folders from your file architecture

Editing Document Date




Document List

smith

Edit Document Metadata

Report Cards Anderson, Betty 222001240.pdf



Record Series :

Person Data :

Document Type :

Document Date :

05-22-2013

Calendar overlay showing May 2013. The date 22 is selected.

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Clicking on the calendar opens up the ability to choose a new document date. **Pro tip:** Clicking on the header allows scrolling across dates, up to 12 years at a time

Editing Document Name



Anytown ... / A / Abbott, Q... / Attendance / Yearly Attendance Record

<input type="checkbox"/>	Filename	Save file name.	Action	Doc Date
<input type="checkbox"/>	2017 Yearly Attendance Record - Abbe	✓ ✗	View Download	02/17/2016
<input type="checkbox"/>	Yearly Attendance Record - Abbott, Que...		View Download	02/17/2016
<input type="checkbox"/>	Yearly Attendance Record - Abbott, Que...		View Download	10/01/2016

Split Document

Share Document

View Document

Download Document

Edit Document Metadata

Hovering your mouse over the document name shows the editing pencil. Clicking on the pencil will allow you to change the document name. **It is recommended that you leave the current naming convention and simply add descriptions to the front.**

What do I do if I need help??



YellowFolder

- You can **email** our support team at support@yellowfolder.com
- If you can't find a document, you can email our **record retrieval** team at recordrequest@yellowfolder.com
- You can **call** our support team at 214-431-3600 or 844-YELLOW-9 (press 2 to speak with a representative)
- Contact your YellowFolder **Paperless Nation Engineer**