



YellowFolder

The Education Documentation Experts

Welcome to YF Basic 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.***

What does YellowFolder do?



YellowFolder

- YellowFolder works exclusively with K–12 school districts across the United States to provide an electronic filing cabinet. We replace your metal paper-filled filing cabinets.
- YellowFolder works with your existing Information System to store, index, and protect all your important documents created from those systems and any others outside that system.
- **YellowFolder will become your electronic filing cabinet!**

Seven Simple Questions



1. Do you know how to print a document?
2. Do you know how to scan a document?
3. Have you ever attached a document to an email?
4. Have you ever dragged and dropped a document into a folder on your computer?
5. Have you ever searched through a file tree on your computer?
6. Have you ever searched in Google?
7. Have you ever refined a search on Amazon?

If you can do these you can use YellowFolder like a pro!

Let's rate your computer skills, how savvy are you with technology?

Understanding Your File Structure



File structure template – documents will be filed in these folders.

File structure in YellowFolder – documents are recognized and filed.

STUDENT RECORDS - FILE STRUCTURE

ACADEMIC TESTING

ACKNOWLEDGEMENT FORMS

CORRESPONDENCE

ENROLLMENT AND ANNUAL REGISTRATION FORMS

HOME LANGUAGE SURVEY

LEARNING DIFFERENCES (504-Dyslexia-ESL-GT)

LEGAL

MEDICAL (Shot Records-Allergies-Diabetic)

MISCELLANEOUS

OFFICIAL TRANSCRIPT AND GRADES

PRE-YELLOWFOLDER

RECYCLE BIN - TRASH

WITHDRAWAL-TRANSFER DOCUMENTS

The screenshot displays the YellowFolder web application interface. At the top, the YellowFolder logo and tagline 'The Education Documentation Experts' are visible. The user is logged in as 'Tessa Tyler' with the email 'tyler.dms@yellowfolder.com'. The current view shows a folder structure for 'Anytown Elementary School / B / Baker, Scotty - 222001244'. The folder list includes: ACADEMIC TESTING, ACKNOWLEDGEMENT FORMS, Grades And Testing, LEGAL, MEDICAL (Shot Records-Allergies-Diabetic), OFFICIAL TRANSCRIPT AND GRADES, and PRE-YELLOWFOLDER. On the right side, there are several action buttons: Split Document, Share Document, View Document, Download Document, and Move Document. A 'Record Series Administrator' section shows the user 'rmelo.c@yahoo.com' (Rebecca Melo). At the bottom right, there is a 'Chat with us' button with icons for chat, email, and phone.

Understanding Your File Structure



File structure template – documents will be filed in these folders.

File structure in YellowFolder – documents are recognized and filed.

SPECIAL EDUCATION RECORDS - FILE STRUCTURE

BEHAVIOR (Restraint-Incident Reports)
CHILD OUTCOME SUMMARY FORMS
CORRESPONDENCE
FULL INDIVIDUAL EVALUATIONS
INDIVIDUAL EDUCATION PLANS
LEGAL
MEDICAID
MEDICAL (Prescriptions-Health Plans-DNR)
MISCELLANEOUS
PRE-YELLOWFOLDER
RECYCLE BIN - TRASH
THERAPY SERVICES LOGS

The screenshot displays the YellowFolder web application interface. At the top, there is a navigation bar with 'File Uploads', 'Tools', and 'Logout' buttons. The YellowFolder logo and tagline 'The Education Documentation Experts' are on the left, and support information '(844) YELLOW-9 (844) 935-5699 support@yellowfolder.com' is on the right. A user profile for 'Tessa Tyler' is shown. Below the navigation, there is a search bar and a 'Your Access' section. The main content area shows a file structure for 'Anytown ES / A / Anderson, Daniel - 1234567899'. The structure includes a list of folders: 'CORRESPONDENCE', 'Evaluations & Psychologicals', 'FULL INDIVIDUAL EVALUATIONS', 'INDIVIDUAL EDUCATION PLANS', 'MEDICAL (Prescriptions-Health Plans-DNR)', 'Miscellaneous', and 'PRE-YELLOWFOLDER'. On the right side of the folder list, there are action buttons: 'Split Document', 'Share Document', 'View Document', 'Download Document', and 'Move Document'. At the bottom right, there is a 'Record Series Administrator' section with contact information for 'rmelo.c@yahoo.com' and 'Rebecca Melo', and a 'Chat with us' button.

Understanding Your File Structure



File structure template – documents will be filed in these folders.

EMPLOYEE RECORDS - FILE STRUCTURE
APPLICATION PACKAGE
BENEFITS AND BENEFICIARY DESIGNATION
CERTIFICATIONS-PERMITS-PD-TRANSCRIPTS
CONTRACTS AND JOB DESCRIPTIONS
CORRESPONDENCE
DIRECT DEPOSIT
EMPLOYEE ACKNOWLEDGEMENT FORMS
FINGER PRINTS AND CRIMINAL HISTORY
I-9
LEGAL-MEDICAL-ATTENDANCE
MISCELLANEOUS
PERFORMANCE (Evaluation-Discipline-Grievances)
PRE-YELLOWFOLDER
RECYCLE BIN - TRASH
RESIGNATION-RETIREMENT-TERMINATION
SALARY DOCUMENTS
VERIFICATION OF PRIOR EMPLOYMENT
W-4

File structure in YellowFolder – documents are recognized and filed.

The screenshot displays the YellowFolder web application interface. At the top, there is a navigation bar with 'File Uploads', 'Tools', and 'Logout' buttons. The YellowFolder logo and tagline 'The Education Documentation Experts' are visible. Contact information for support is provided: (844) YELLOW-9 (844) 935-5699 and support@yellowfolder.com. The user is identified as 'Hi, Tessa Tyler (tyler.dms@yellowfolder.com)'. A search bar with 'Search' and 'Advanced Search' buttons is present. The main content area shows a file structure for 'A / Adams, Ethan - 9876543211'. The structure includes folders for 'BENEFITS AND BENEFICIARY DESIGNATION', 'CERTIFICATIONS-PERMITS-PD-TRANSCRIPTS', 'I-9', 'Miscellaneous', 'PERFORMANCE (Evaluation-Discipline-Grievances)', and 'PRE-YELLOWFOLDER'. A sidebar on the left shows 'Order By' options (Name, SR, SPED, HR) and a list of users including 'Adkins, Michael - 98...', 'Aguilar, Jayden - 987...', and 'Alexander, William - ...'. The bottom right corner features a 'Chat with us' widget with icons for chat, email, and phone.

Understanding Your File Structure



File structure template – documents will be filed in these folders.

ADMINISTRATIVE RECORDS - FILE STRUCTURE
ACCOUNTING
BANKING STATEMENTS
BUDGET
CORRESPONDENCE
EXTRACURRICULAR
FACILITY USE-WORK ORDERS-MAINTENANCE
FOOD SERVICES
HEALTH SERVICES
HUMAN RESOURCES
LEGAL
MISCELLANEOUS
PAYROLL
PRE-YELLOWFOLDER
RECYCLE BIN - TRASH
SCHOOL BOARD
TECHNOLOGY
TITLE 1 DOCUMENTATION OF 36 INDICATORS
TITLE 1 FEDERAL MONITORING REPORTS
TRANSPORTATION
VENDOR CONTRACTS

File structure in YellowFolder – documents are recognized and filed.

Your Access : Archive Admin
Your Title : Super Administrator [Show More](#)

SR
SPED
HR
AR

- ACCOUNTING
- BANKING STATEMENTS
- Budget
- EXTRACURRICULAR
- FACILITY USE-WORK ORDERS-MAINTENANCE
- FOOD SERVICES
- HEALTH SERVICES
- HUMAN RESOURCES
- Miscellaneous
- Payroll
- SCHOOL BOARD
- TITLE 1 FEDERAL MONITORING REPORTS

Box Level

Uploading Documents



There are four ways to upload documents to YellowFolder:

- 1) Using the **Virtual Printer**
- 2) Using the **Droplet**
- 3) Using Scan
- 4) Using Upload

For today's training, we will focus on the Virtual Printer and Droplet tools. For additional training on the other tools, schedule sessions with me or attend weekly virtual trainings at www.yellowfolder.com and click on Trainings in the upper right corner.

Which do I use?

It depends on what you are uploading and personal preference...

Virtual Printer

You already know how to print a document,
so you know how to use YellowFolder.

Virtual Printer – Logging into the Tool



YellowFolder

Let's Get Started

Login with your YellowFolder username and password to begin uploading documents.

koglesby.dms@yellowfolder.com

Password

Remember me

Forgot Password

Submit

HINT: The “Forgot Password” feature will aid in resetting the password if it is forgotten.

The user will click the “Submit” button after typing in the username and password.

Droplet – Current Tool



Click “Help”, then click “Check for Updates” to ensure you have the most current Droplet and Virtual Printer – Tool Dashboard.



Let's Get Started

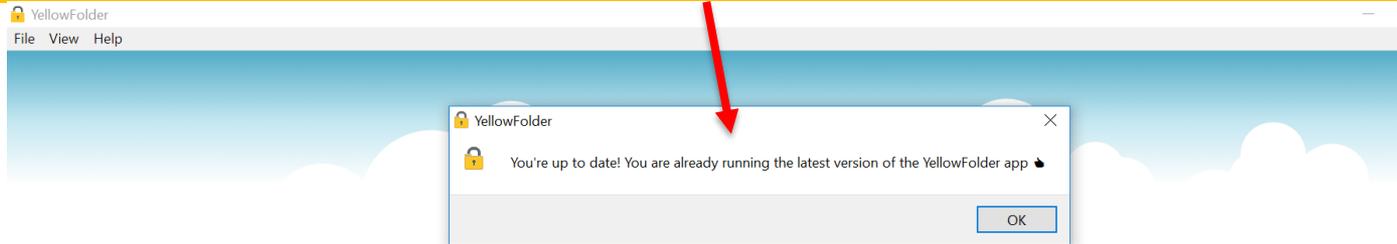
Login with your YellowFolder username and password to begin uploading documents.

Remember me [Forgot Password](#)

Droplet – Current Tools, Cont.



A pop-up will appear to indicate whether you have the current version of tools. If not, you will be prompted to update your Tool Dashboard.



Let's Get Started

Login with your YellowFolder username and password to begin uploading documents.

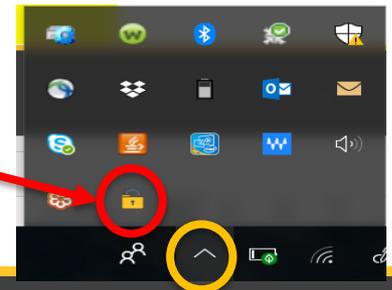
ttyler.dms@yellowfolder.com

Password

Remember me

[Forgot Password](#)

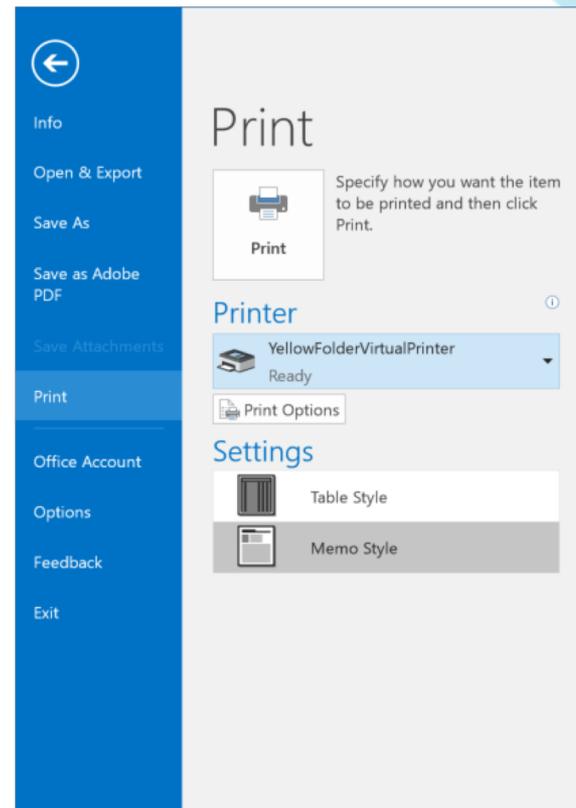
HINT: Once you log into the tools, the application will continue running in order to finish processing, especially Virtual Printer uploads. Due to a Windows issue, find the tools icon in the system tray to “re-store” the tool’s window.



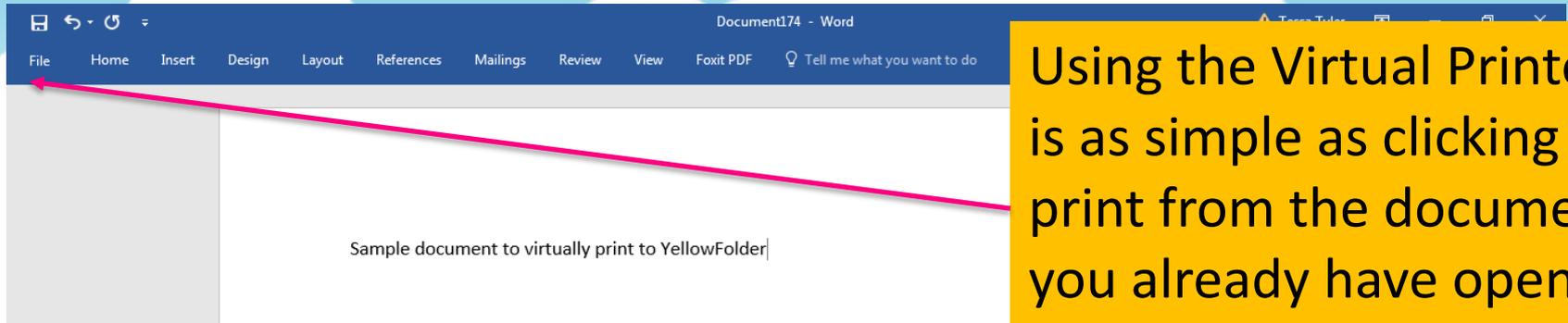
Virtual Printer - Uploading Documents



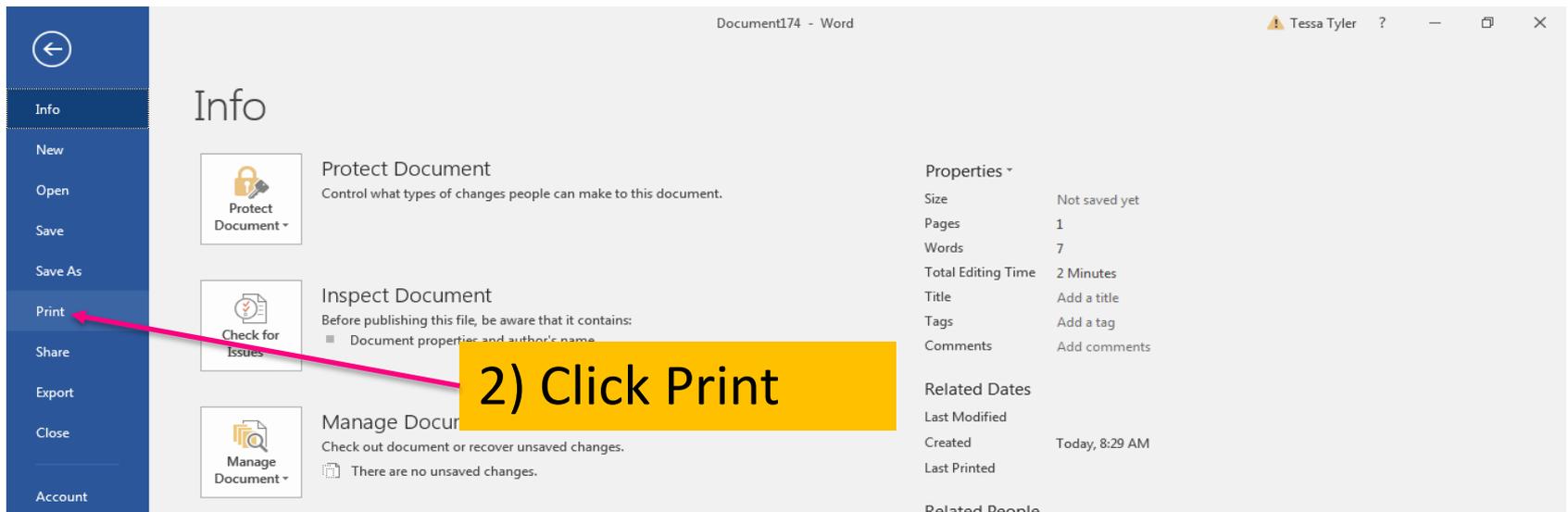
Watch a live demonstration in the YellowFolder system of how to use the Virtual Printer tool



Uploading Documents



Using the Virtual Printer is as simple as clicking print from the document you already have open.
1) Click File

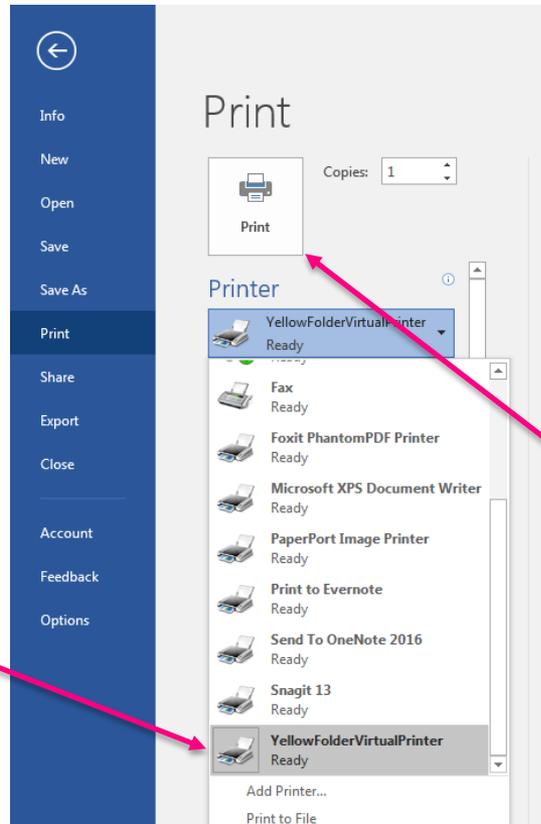


Uploading Documents



Using the Virtual Printer

3) Choose YellowFolder VirtualPrinter from the printer drop down menu

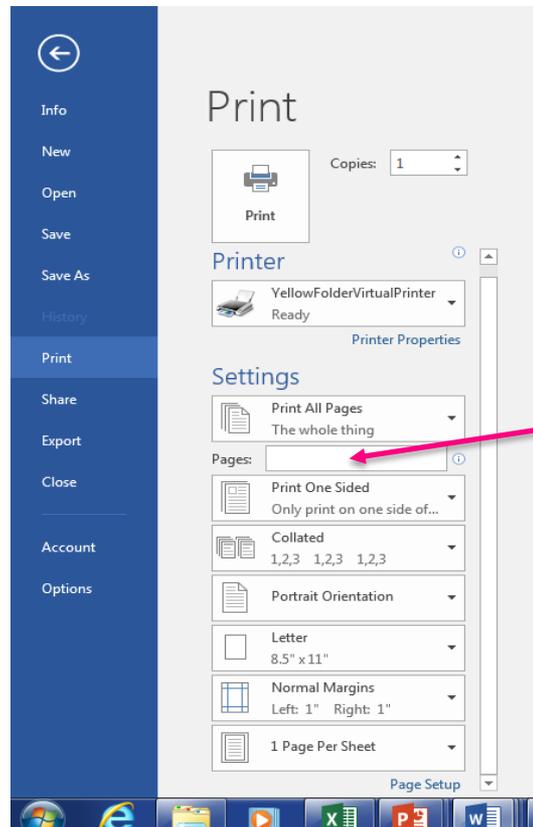


4) Click Print button

Uploading Documents



Print



* May select specific page ranges if not needing to upload an entire document or if needing to break up a document

Uploading Documents



Print

You can access a list of recently printed documents by clicking on the Recently Printed Documents tab from your Tool Dashboard.

The screenshot shows the YellowFolder web application interface. The browser window title is 'YellowFolder' and the menu includes 'File', 'View', and 'Help'. A 'Logout' link is in the top right. The main content area is divided into two columns. The left column contains navigation options: 'Droplet' with a sub-menu of 'Student Records', 'Special Education Records', 'Employee Records', and 'Administrative Records'; 'Virtual Printer' with a 'Recently Printed Documents' tab; and 'YellowFolder' with search and training session options. The right column features a 'My Activity' line graph showing activity levels over 20 days, a 'Welcome Beta Users!' announcement, and a 'Notifications' section for 'Version 3.2.32-beta'.

Day	Activity Level
1	0
2	0
3	0
4	0
5	16
6	0
7	0
8	0
9	0
10	9
11	0
12	2
13	0
14	0
15	0
16	0
17	0
18	0
19	0
20	0

Uploading Documents



Print

YellowFolder
File View Help

Tool Dashboard Logout

Virtual Printer

Filename	Date Uploaded	View	Download
FSA-Enrollment-Form_HR 12222016_1.pdf	12/19/2018 8:44 am		
Certificate_HR 12222016_1.pdf	12/19/2018 8:44 am		
SummativeEvaluationForm_HR 12222016_1.pdf	12/19/2018 8:44 am		
Transcript_HR 12222016_1.pdf	12/19/2018 8:44 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 10:43 am		
Certificate_HR 12222016_1.pdf	12/10/2018 10:43 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 8:36 am		
Employment Application_HR 12222016_1.pdf	12/10/2018 8:36 am		
I-9_HR 12222016_1.pdf	12/10/2018 8:36 am		
FSA-Enrollment-Form_HR 12222016_1.pdf	12/10/2018 8:36 am		

« < 1 2 > »

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From the list, you are able to:

- View recently printed documents
- Download recently printed documents

Uploading Documents



Print

You can search documents in YellowFolder by clicking Search Records in Browser.

You can view and register for our weekly live training sessions by clicking View Weekly Training Sessions

The screenshot shows the YellowFolder web application interface. The main content area is titled 'Virtual Printer' and contains a table of documents. The table has columns for 'Filename', 'Date Uploaded', and icons for viewing and downloading. The documents listed are:

Filename	Date Uploaded	View	Download
FSA-Enrollment-Form_HR 12222016_1.pdf	12/19/2018 8:44 am		
Certificate_HR 12222016_1.pdf	12/19/2018 8:44 am		
SummativeEvaluationForm_HR 12222016_1.pdf	12/19/2018 8:44 am		
Transcript_HR 12222016_1.pdf	12/19/2018 8:44 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 10:43 am		
Certificate_HR 12222016_1.pdf	12/10/2018 10:43 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 8:36 am		
Employment Application_HR 12222016_1.pdf	12/10/2018 8:36 am		
I-9_HR 12222016_1.pdf	12/10/2018 8:36 am		
FSA-Enrollment-Form_HR 12222016_1.pdf	12/10/2018 8:36 am		

At the bottom of the page, there are links for 'Terms of Use' and 'Privacy Policy'.

Uploading Documents



Your turn to use Virtual Printer. Simply open a document, go to print and view how easy it is to use Virtual Printer. Recommend **NOT** using this unless you have actual documents to upload into the system.

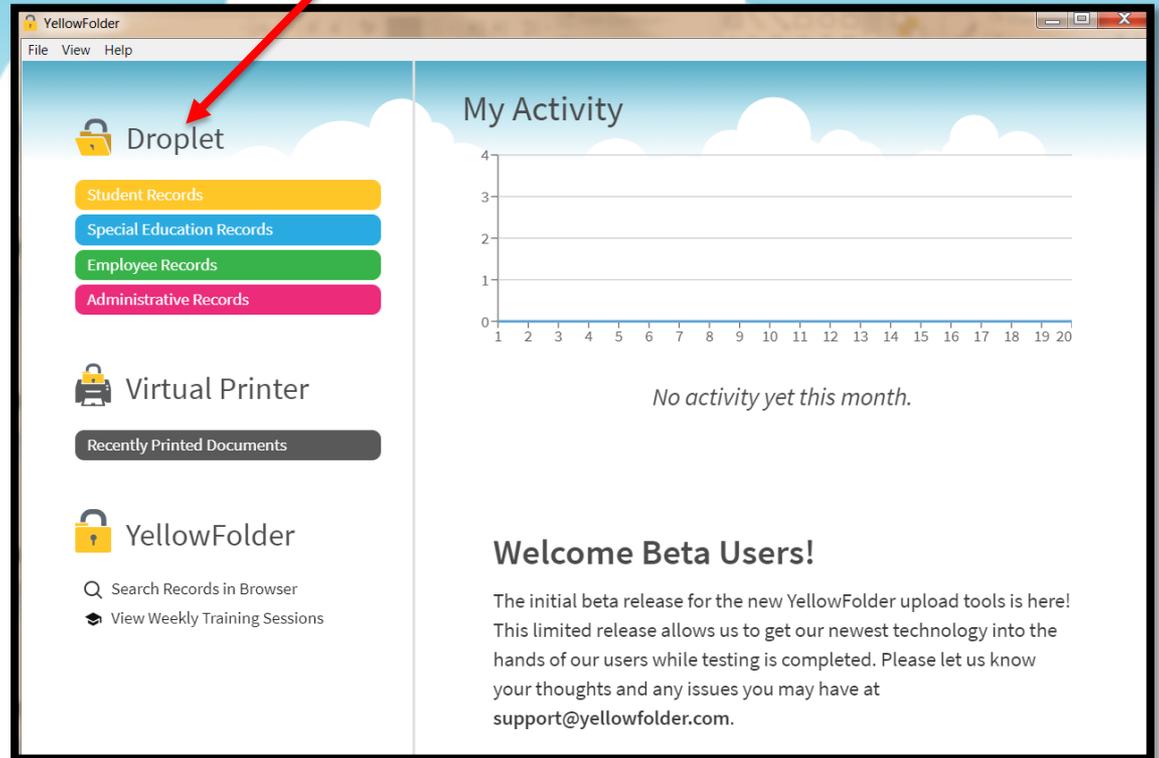
The Droplet

You have probably attached documents to an email and dragged and dropped documents into a folder on your computer, therefore you already know how to use YellowFolder.

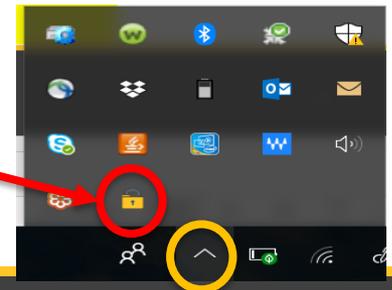
Droplet - Uploading Documents



Watch a live demonstration in the YellowFolder system of how to use the Droplet tool



HINT: Once you log into the tools, the application will continue running in order to finish processing, especially Virtual Printer uploads. Due to a Windows issue, find the tools icon in the system tray to “re-store” the tool’s window.



Droplet – Logging into the Tool



Let's Get Started

Login with your YellowFolder username and password to begin uploading documents.

koglesby.dms@yellowfolder.com

Password

Remember me

Forgot Password

Submit

HINT: The “Forgot Password” feature will aid in resetting the password if it is forgotten.

The user will click the “Submit” button after typing in the username and password.

Droplet – Current Tool



Click “Help”, then click “Check for Updates” to ensure you have the most current Droplet and Virtual Printer – Tool Dashboard.



Let's Get Started

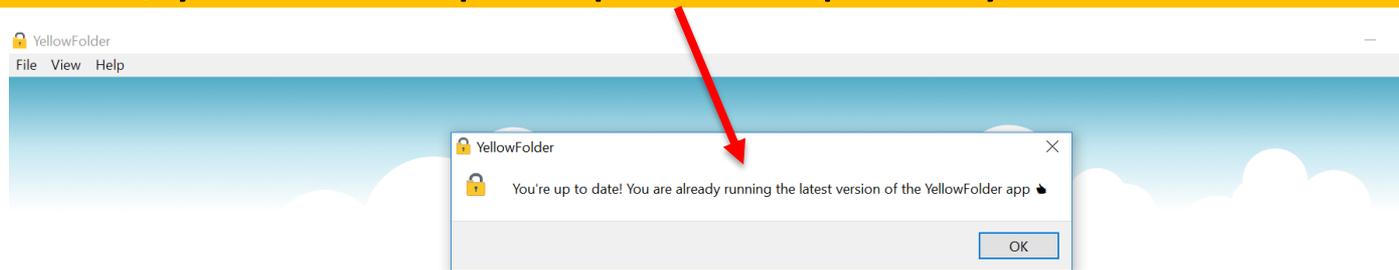
Login with your YellowFolder username and password to begin uploading documents.

Remember me [Forgot Password](#)

Droplet – Current Tools, Cont.



A pop-up will appear to indicate whether you have the current version of tools. If not, you will be prompted to update your Tool Dashboard.



Let's Get Started

Login with your YellowFolder username and password to begin uploading documents.

tt Tyler.dms@yellowfolder.com

Password

Remember me

[Forgot Password](#)

Submit

Droplet – Welcome Screen



The upload tool home screen lets the user know how many batches of documents have been uploaded that month. Also, a greeting message keeps the user apprised of any updates or other messages from YellowFolder.

Logout

Droplet

- Student Records
- Special Education Records
- Employee Records
- Administrative Records

Virtual Printer

Recently Printed Documents

YellowFolder

- Search Records in Browser
- View Weekly Training Sessions

My Activity

Day	Activity Count
1	0
2	0
3	0
4	0
5	0
6	0
7	0
8	0
9	0
10	0
11	0
12	0
13	0
14	0
15	0
16	0
17	0
18	0
19	0
20	4
21	0

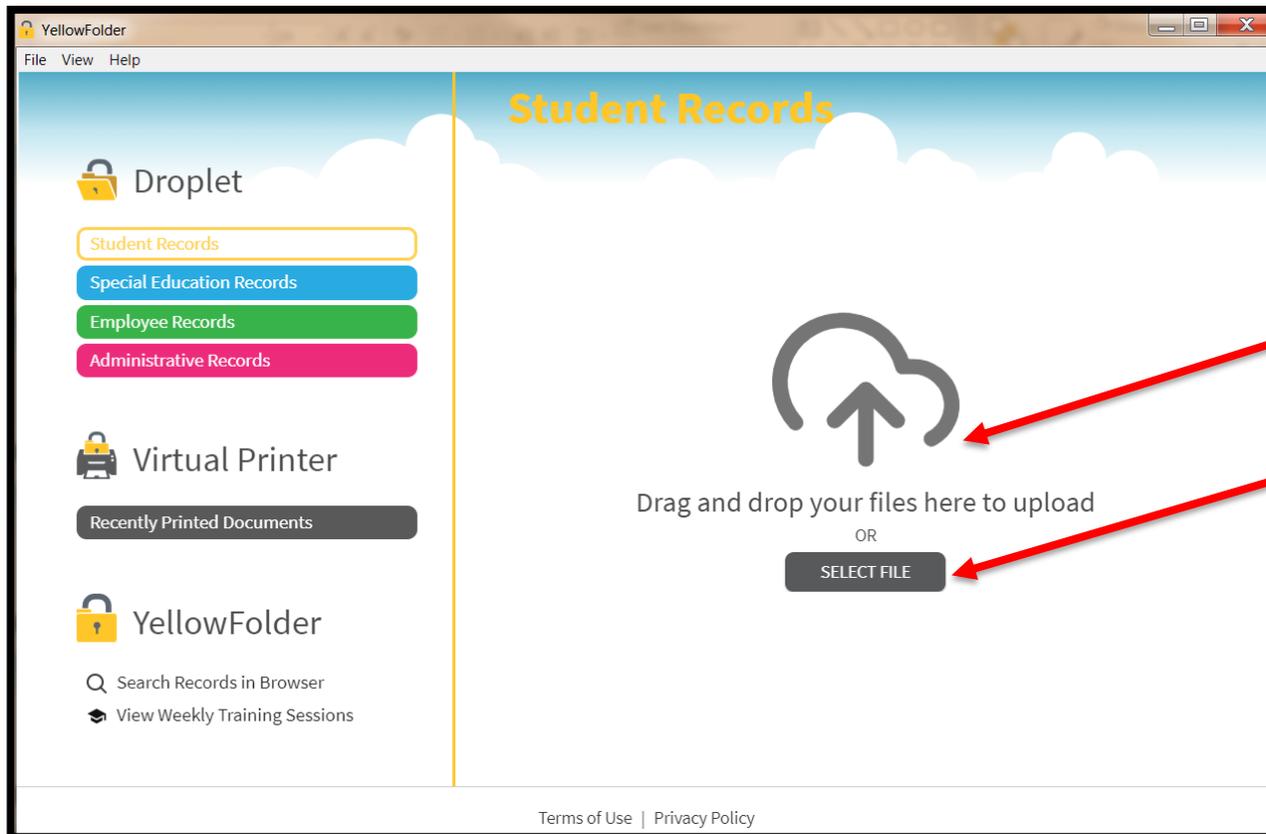
Welcome Beta Users!

The initial beta release for the new YellowFolder upload tools is here! This limited release allows us to get our newest technology into the hands of our users while testing is completed. Please let us know your thoughts and any issues you may have at support@yellowfolder.com.

Droplet – Uploading Documents

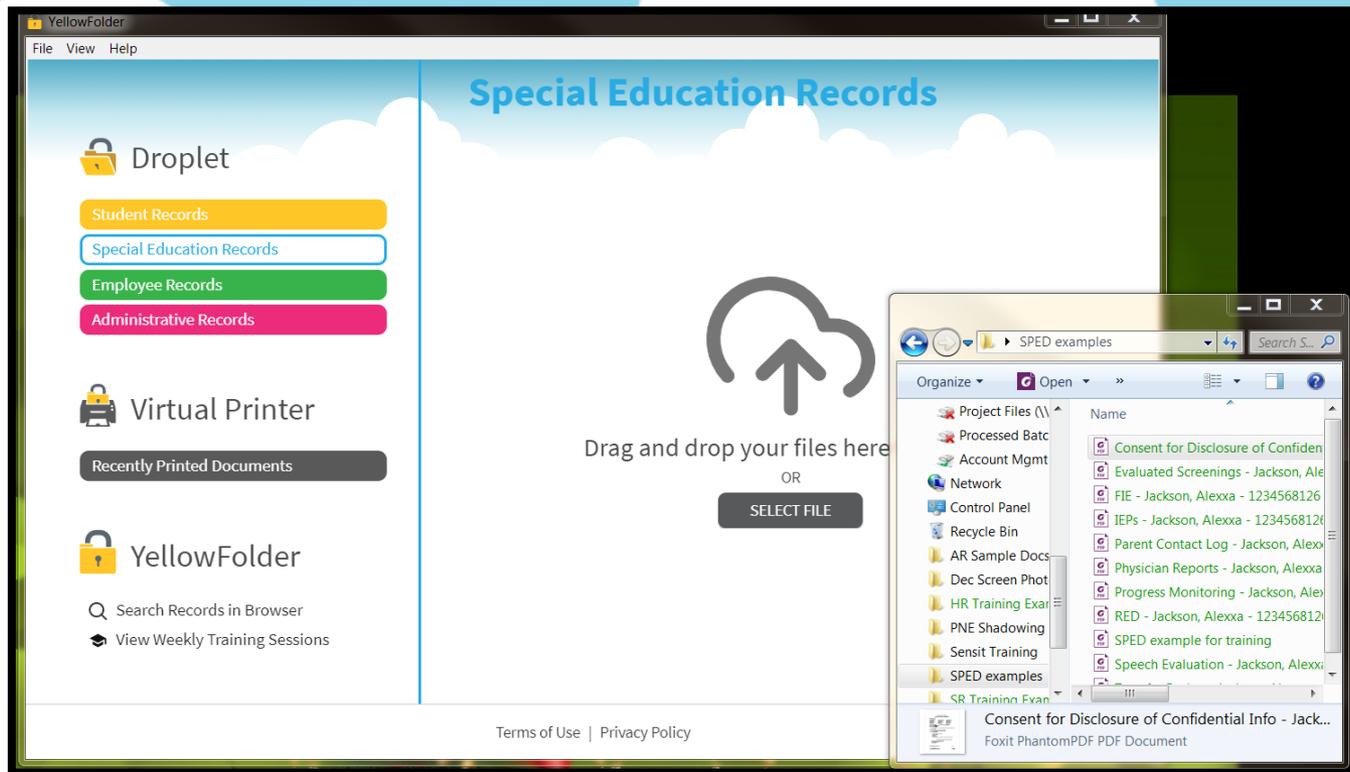


Helpful Hint: When scanning consider saving your documents on a flash/USB drive rather than emailing them to yourself for easier and faster uploading using the Droplet.



The Droplet tool allows the user to upload in different ways. The user can select the documents **OR** drag the documents across the desktop into the Droplet.

Droplet – 2 Ways to Use It!



Option #1: The user can drag over one or multiple documents to upload.

Option #2: The user can click on the “Select File” button to pick one or multiple documents for uploading.

Droplet – Uploading Single Person Documents



If all of the documents belong to one person, the user will pick the “Single Person” button to continue the loading process.

Batch Type


Single Person


Multiple Persons

- The documents in this batch must belong to only one person.
- Different document types must be a separate file in order to upload to the correct folder.
- The first page of each document determines the folder it will be filed in.
- The system does not split persons or documents from within a single file.

- The documents in this batch belong to more than one person.
- Each person with different document types must be a separate file to upload into the correct person and folder.
- The system does not split persons or documents from within a single file.

Cancel Submit Batch

Select the “Submit Batch” button.

Droplet – Uploading Multiple Persons Documents



YellowFolder

Batch Type



Single Person

- The documents in this batch must belong to **only one person**.
- Different document types must be a separate file in order to upload to the correct folder.
- The first page of each document determines the folder it will be filed in.
- The system does not split persons or documents from within a single file.



Multiple Persons

- The documents in this batch belong to **more than one person**.
- Each person with different document types must be a separate file to upload into the correct person and folder.
- The system does not split persons or documents from within a single file.

Select the “Submit Batch” button.

Cancel Submit Batch

If the documents belong to multiple people, the user will pick the “Multiple Persons” button to continue the loading process.

Droplet – Recent Upload List



YellowFolder

File View Help

Special Education Records

Recent Uploads

New Upload

Filename	Date Uploaded		
RED - Jackson, Alexxa - 1234568126.pdf	12/20/2018 4:19 pm	👁	📄
Physician Reports - Jackson, Alexxa - 12345...	12/20/2018 4:19 pm	👁	📄
Progress Monitoring - Jackson, Alexxa - 123...	12/20/2018 4:19 pm	👁	📄
	12/20/2018 4:18 pm	👁	📄

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The “New Upload” button will start the upload process again.

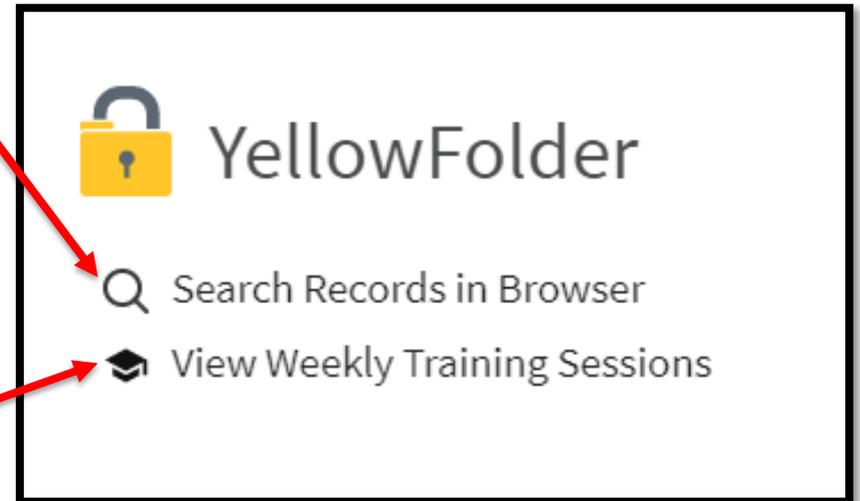
The user can select the eye icon to immediately view the document.

Selecting the download icon will provide the user with a copy of the document.

Droplet – Extra Features

The “Search Records in Browser” feature allows the user to click and go online to the YellowFolder platform.

The weekly training sessions offered by the Paperless Nation Engineer team can be easily accessed within the Droplet tool.



Uploading Documents



Your turn to use Droplet on your computer. Open the Tool Dashboard, click on the record series and see how easy to use Droplet. Do **NOT** recommend using Droplet unless you have actual documents to add to YellowFolder.

Interactive Dashboard

Interactive Dashboard



Watch a live demonstration in the YellowFolder system of how to use the Interactive Dashboard.

The screenshot displays the YellowFolder Interactive Dashboard. At the top left is the YellowFolder logo with the tagline 'The Education Documentation Experts'. To the right are navigation buttons for 'File Uploads', 'Tools', and 'Logout'. Contact information for support is provided: '(844) YELLOW (844) 935-56' and 'support@yellowfolder.co'. A user greeting 'Hi, Kelly Oglesby (Koglesby.dms@yellowfolder.co)' is visible. The dashboard features a sidebar with user access details ('Your Access: Archive Admin', 'Your Title: Full Subscriber'), search filters ('Order By' with 'Campus' and 'Name' options), and a list of box levels (SR, Active, Archive, SPED, HR, AR). The main content area includes a 'Welcome, Kelly Oglesby' message and four summary cards: '62 uploads this month', '53 uploads needing Information', '18 uploads needing verification', and '29 Batches In complete status'. Below these are sections for 'Bookmarks' (empty), 'Recent Downloads' (listing '2016 Yearly Attendance Record - Abbott, Quentin - ...'), and 'Saved Searches' (empty). A 'Checked Out Documents' section is also present at the bottom right.

Dashboard



All uploads appear on user's dashboard

To get to your dashboard, you can click on File Uploads, Uploads this month, Uploads needing information, Uploads needing verification, or Batches in complete status.

Your Access : Archive Admin
Your Title : Full Subscriber [Show More](#)

Order By
 Campus Name

SR

Active Archive
Box Level

SPED

HR

Welcome, Sharon McClain

0 uploads this month

0 uploads needing information

0 uploads needing verification

0 Batches in complete status

Bookmarks [View All](#)

- Standardized Testing - Anderson, Betty - 222001...
- Student Information Card - Anderson, Betty - 22...

Recent Downloads [View All](#)

- Standardized Testing - Aguirre, Vivian - 22200123...
- Report Cards - Aguirre, Vivian - 222001239.pdf

Saved Searches

Checked Out Documents

Search Advanced Search

File Uploads Tools Logout

support: (844) YELLOW-9 (844) 935-5699 support@yellowfolder.com

Sharon McClain (smcclain.dms@yellowfolder.com)

Dashboard



Three parts of the Dashboard:

1. Information Required
2. Verification Required
3. In process and completed

Selecting Record Series

Hi, Tester One (testerone@dispostable.com)

A **Information Required** Bulk Actions Student Records

<input type="checkbox"/>	Printed Date	Batch Name	Record Series	Status
<input type="checkbox"/>	07/13/2016	YJMP07132016-40484_YJM_Categorize Scan	--Please Select--	Information Required <input type="checkbox"/>
<input type="checkbox"/>	07/13/2016	YJMP07132016-40486_YJM_Categorize Scan	--Please Select--	Information Required <input type="checkbox"/>

Results 1 to 2 of 2 Page 1 of 1

B **Verification Required**

	Batch Name	Date	Record Series	First Name	Last Name	Identification Number	Status
<input type="checkbox"/> <input type="checkbox"/>	YJMP07122016-40407_YJM_SR_Categorize Scan	07/12/2016	Student Records	<input type="text"/>	<input type="text"/>	<input type="text"/>	Active <input type="checkbox"/>

Results 1 to 1 of 1 Page 1 of 1

C **In Process & Completed** From To

Date	Batch Name	Record Series	Channel	Status
07/12/2016	YJMP07122016-40412_YJM_SPED_Categorize Scan	Special Education Records	Print	Completed
07/12/2016	YJMP07122016-40410_YJM_HR_Categorize Scan	Human Resource Records	Print	Completed

Dashboard



INFORMATION REQUIRED:

- IR is a queue where batches enter when a user has more than one record series.

A user can also preview the document by selecting the batch name.

Select record series here

The screenshot shows a dashboard with a table of batches. The table has columns for 'Printed Date', 'Batch Name', 'Record Series', and 'Status'. The first row is selected. A dropdown menu is open under the 'Record Series' column, showing options: '--Please Select--', 'Student Records', 'Special Education Records', and 'Human Resource Records'. The 'Student Records' option is highlighted. Below the table are 'Merge' and 'Save' buttons. A 'Bulk Actions' dropdown is set to 'Student Records'. The page shows 'Results 1 to 2 of 2' and 'Page 1 of 1'.

	Printed Date	Batch Name	Record Series	Status
<input type="checkbox"/>	07/13/2016	YJMP07132016-40484_YJM_Categorize Scan	--Please Select--	Information Required <input type="checkbox"/>
<input checked="" type="checkbox"/>	07/13/2016	YJMP07132016-40486_YJM_Categorize Scan	--Please Select--	Information Required <input type="checkbox"/>

A user can update one batch at a time or multiple.
* Must check box before records will merge or save

Saving the update will move batch to the next stage for processing.

Dashboard



VERIFICATION REQUIRED

- VR is a queue where batches enter when the system is unable to associate the files to a person from the CSV.

The screenshot shows the YellowFolder dashboard interface. At the top, there are navigation buttons for 'Download', 'Scan & Upload', 'Search Records', and 'Logout'. The YellowFolder logo and contact information (support: (844) YELLOW-9, (844) 935-5699, support@yellowfolder.com) are on the right. Below the navigation, there is a user greeting: 'Hi, Sharon McClain (smcclain.dms@yellowfolder.com)'. The main content area is titled 'Dashboard' and 'Verification Required'. A table lists a single batch with the following details:

	Batch Name	Date	Record Series	Person Data
EDIT	ANTS08192017-227305_ANT_HR_Categorize Scan	08/19/2017	Human Resource Records	<input type="text" value="Search by First Name, Last Name or Identification Number"/>

Below the table, it shows 'Results 1 to 1 of 1' and 'Page 1 of 1'. A red arrow points from a yellow callout box to the 'EDIT' button.

Click here to edit batch

Deletes batch

* After clicking edit, an update button will appear and you will have the ability to write in the identifying information boxes

Dashboard



VERIFICATION REQUIRED Continued

A user can preview the document by selecting the batch name.

Download Scan & Upload Search Records Logout

support: (844) YELLOW-9
(844) 935-5699
support@yellowfolder.com

Hi, Sharon McClain (smcclain.dms@yellowfolder.com)

Dashboard

Verification Required

	Batch Name	Date	Record Series	Person Data
EDIT	ANTS061810017-227305_ANT_HR_Categorize Scan	08/19/2017	Human Resource Records	Search by First Name, Last Name or Identification Number
	ANT_HR_S_08222017_408378.pdf	Miscellaneous	08/23/2017	

UPDATE CANCEL

Results 1 to 1 of 1 Page 1 of 1

1) Enter missing information into text boxes

2) Click the "Update" button to move batch straight to the digital file folder it belongs in after entering missing information

Dashboard



VERIFICATION REQUIRED Continued

Download Scan & Upload Search Records Logout

YellowFolder
The Education Documentation Experts

support: **(844) YELLOW-9**
(844) 935-5699
support@yellowfolder.com

Hi, Sharon McClain (smcclain.dms@yellowfolder.com)

Dashboard

Verification Required

	Batch Name	Date	Record Series	Person Data
EDIT ✗	ANTS06192017-227305_ANT_HR_Categorize Scan ANT_HR_S_06222017_406378.pdf Application	08/19/2017 08/01/2013	Human Resource Records	<div data-bbox="1155 706 1734 1173"><p>Sanders, Lila-9876543614, Active Termination Date: None</p><p>Phillips, Lilly Lia-9876543566 DOB: 12/23/1970 Status: Active Termination Date: None</p><p>Reese, Liliana Savanna-9876543583 DOB: 1/9/1971 Status: Active Termination Date: None</p><p>Sanders, Lila Nyla-9876543614 DOB: 2/9/1971 Status: Active Termination Date: None</p><p>ADD NEW PERSON</p></div>

Results 1 to 1 of 1 Page 1 of 1

In Progress: Completed

Record Special Educ

A drop down of current names will appear. Scroll through the names. If you see the person for which you are looking, click on his/her name. If you do not see the name for which you are looking, choose "Add New Person".

Dashboard



VERIFICATION REQUIRED Continued

Download Scan & Upload Search Records Logout

support: (844) YELLOW-9
(844) 935-5699
support@yellowfolder.com

Hi, Sharon McClain (smcclain.dms@yellowfolder.com)

Dashboard

Verification Required

	Batch Name	Date	Record Series	Person Data
EDIT ✖	ANTS06192017-227305_ANT_HR_Categorize Scan	06/19/2017	Human Resource Records	<input type="text" value="Search by First Name, Last Name or Identification Number"/>
	ANT_HR_S_08222017_408378.pdf <input type="text" value="Application"/>	<input type="text" value="08/01/2013"/> ✖		<p>First Name : <input type="text"/></p> <p>Last Name : <input type="text"/></p> <p>Identification Number : <input type="text"/></p> <p>Date of Birth: <input type="text"/></p> <p>Campus: <input type="text"/></p> <p>Status: <input type="text" value="Active"/></p> <p>ADD PERSON CANCEL</p>

[UPDATE](#) [CANCEL](#)

Results 1 to 1 of 1 Page 1 of 1

Fill in the information required then choose "Add Person"

Dashboard



IN-PROCESS AND COMPLETED

After clicking Update on the Verification Required Screen, the batch(es) will move back to the In-Process and Completion screen as Filing then Completed. Once it is in Completed status, it is searchable.

The screenshot shows the YellowFolder dashboard interface. At the top, there is a navigation bar with buttons for 'Download', 'Scan & Upload', 'Search Records', and 'Logout'. The user is logged in as 'Hi, Sharon McClain (smcclain@yellowfolder.com)'. Below the navigation bar, there is a 'Dashboard' section and an 'In Process & Completed' section. The 'In Process & Completed' section contains a table with the following data:

Date	Batch Name	Record Series	Channel	Status
08/29/2016	PNCP08292016-46240_PNC_Categorize Scan		Print	OCR Processing
08/25/2016	PNCP08252016-45268_PNC_HR_Categorize Scan	Human Resource Records	Print	Completed

Below the table, it shows 'Results 1 to 2 of 2' and 'Page 1 of 1'. A red arrow points from a yellow box labeled 'Completed status' to the 'Completed' status cell in the second row of the table.

Depending on whether or not you uploaded any documents in this training your dashboard could still be empty, however if you did upload documents you will see them here. Complete the final process by verifying any documents you have in Information or Verification Required.

Advance Search

You have conducted searches for specific criteria,
therefore you already know how to use YellowFolder.

Searching



There are four ways to search for documents in YellowFolder:

- 1) Using a File Tree Search
- 2) Using Search
- 3) Using **Advance Search**
- 4) Using Box Search

For today's training, we will focus on the Advance Search. For additional training on other search options, schedule sessions with me or attend weekly virtual trainings at www.yellowfolder.com and click on Trainings in the upper right corner.

What is Advanced Search?



Advanced Search is a search feature that allows you to **narrow your results** for documents by choosing various criteria.

Advanced Search **should be used most** frequently when searching for active or archive documents as it is the easiest and most accurate way to search for specific criteria.

How do I use Advance Search?



Watch a live demonstration in the YellowFolder system of how to use Advance Search.

Advanced Search is located on the right side of your homepage.

Hi, Claudia Mullins (cmullins.dms@yellowfolder.com)

Your Access : Archive Admin
Your Title : User [Show More](#)

Search **Advanced Search**

Order By
 Campus Name

SR

+ Active
+ Archive
Box Level

SPED
HR
AR

Advanced Search

Select any combination of criteria to search. Click a criteria more than once to search by more than one value.

First Name Last Name ID Number Date Of Birth Age Campus Document Type Status
Record Series Box Number Document Id Batch Name Document Name Document Description
Applicable School Year Graduation Date Withdrawal Date Most Recent IEP Date Applicable School Year
Hire Date Termination Date Employee Type Employee Position Include Folders

** = wildcard*

Saved Searches

My Saved Search-1 **Save**

How do I use Advanced Search?



The screenshot displays the YellowFolder dashboard for user Candice Earnest. At the top right, there are navigation tabs: 'File Uploads', 'Tools', 'Logout', and a help icon. Below these, contact information is provided: 'support: (844) YELLOW-9 (844) 935-5699 support@yellowfolder.com'. The user's name and email, 'Hi, Candice Earnest (cearnest.dms@yellowfolder.com)', are shown. A search bar contains a search input field and two buttons: 'Search' and 'Advanced Search'. A red arrow points to the 'Advanced Search' button. On the left sidebar, there are sections for 'Your Access' (Archive Admin, User), 'Order By' (Campus, Name), and 'Box Level' (SR, Active, Archive, SPED, HR, AR). The main content area shows a welcome message and four summary cards: '1 uploads this month', '1 uploads needing information', '6 uploads needing verification', and '0 Batches in complete status'. Below these are sections for 'Bookmarks' (no documents bookmarked), 'Recent Downloads' (one PDF file), and 'Saved Searches'.

1. Click on the Advanced Search tab.

How do I use Advanced Search?



Hi, Claudia Mullins (cmullins.dms@yellowfolder.com)

Your Access : Archive Admin
Your Title : User [Show More](#)

Order By
 Campus Name

SR

Active
 Archive
Box Level

SPED
HR
AR

Advanced Search

Select any combination of criteria to search. Click a criteria more than once to search by more than one value.

First Name Last Name ID Number Date Of Birth Age Campus Document Type Status

Record Series Box Number Document Id Batch Name Document Name Document Description

Applicable School Year Graduation Date Withdrawal Date Most Recent IEP Date Applicable School Year

Hire Date Termination Date Employee Type Employee Position Include Folders

* = wildcard

Saved Searches

My Saved Search-1

2. Select any combination of criteria to narrow your search results.

How do I use Advanced Search?



Hi, Claudia Mullins (cmullins.dms@yellowfolder.com)

Your Access : Archive Admin
Your Title : User

[Show More](#)

Search

Advanced Search

Order By

Campus Name

SR

Active

Archive

Box Level

SPED

HR

AR

Advanced Search

Select any combination of criteria to search. Click a criteria more than once to search by more than one value.

First Name Last Name ID Number Date Of Birth Age Campus Document Type Status

Record Series Box Number Document Id Batch Name Document Name Document Description

Applicable School Year Graduation Date Withdrawal Date Most Recent IEP Date Applicable School Year

Hire Date Termination Date Employee Type Employee Position Include Folders

** = wildcard*

First Name

equals



and

Last Name

equals



Saved Searches

My Saved Search-1

Save

Checked Out Documents



3. Enter the applicable information into the text fields for the criteria chosen.

How do I use Advanced Search?



First Name

Last Name

4. Once all applicable information has been entered, click the Submit button.

Where will my Advanced Search results appear?



Search Results

<input type="checkbox"/>	Filename	Action	Doc Date
<input type="checkbox"/>	 2016 Parent Contact Log - Anderson, Daniel - 12...	 View Download	10/20/2016
<input type="checkbox"/>	 FIE Current 2017 - Anderson, Daniel - 123456789...	 View Download	08/16/2017
<input type="checkbox"/>	 IEPs - Anderson, Daniel - 1234567899.pdf	 View Download	01/27/2014 
<input type="checkbox"/>	 Notes from Nurse - Anderson, Daniel - 12345678...	 View Download	09/11/2017
<input type="checkbox"/>	 Physician Reports - Anderson, Daniel - 1234567...	 View Download	07/09/2013
<input type="checkbox"/>	 Progress Monitoring - Anderson, Daniel - 12345...	 View Download	02/17/2014
<input type="checkbox"/>	 RED - Anderson, Daniel - 1234567899.pdf	 View Download	01/20/2014
<input type="checkbox"/>	 Speech Evaluation - Anderson, Daniel - 1234567...	 View Download	10/20/2016
<input type="checkbox"/>	 Transfer Packet - Anderson, Daniel - 1234567899...	 View Download	12/07/2017

Your search results will appear in a document list in the middle of your screen.

Are there different ways to view my search results?



Clicking the 4 squares button will provide a **thumbnail preview** of the documents without having to view the file. Clicking on the 3 bars switches back to the **list view**.

YellowFolder
The Education Documentation Experts

File Uploads Tools Logout ?

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 [Show More](#)

standardized testing mallory barr 222001249 [Search](#) [Advanced Search](#)

Order By
 Campus Name

SR

Active
 Archive
Box Level

SPED

HR

AR

Content Results: "standardized testing mallory barr 222001249"

SR SPED HR AR

Score Official Transcript of Grade... [View Download](#)

Score Standardized Testing ... [View Download](#)

Score Standardized Testing - Barr,... [View Download](#)

Score Yearly Attendance Record -... [View Download](#)

Score Immunization Shot Record -... [View Download](#)

Score Parent-Guardian Consent f... [View Download](#)

Score Report Cards - Barr, Mallor... [View Download](#)

Score Immunization Shot Record -... [View Download](#)

[Split Document](#)

[Share Document](#)

[View Document](#)

[Download Document](#)

[Edit Document Metadata](#)

Record Series Administrator

anytownsr.rsa@yellowfolder.com
SR_ANYTownRSA_fn SR_ANYTownRSA_In

Chat with us

How do I view the document I need?



Search Results

<input type="checkbox"/>	Filename	Action
<input type="checkbox"/>	2016 Parent Contact Log - Anderson, Daniel - 12...	View
<input type="checkbox"/>	FIE Current 2017 - Anderson, Daniel - 123456789...	View
<input type="checkbox"/>	IEPs - Anderson, Daniel - 1234567899.pdf	View
<input type="checkbox"/>	Notes from Nurse - Anderson, Daniel - 12345678...	View
<input type="checkbox"/>	Physician Reports - Anderson, Daniel - 1234567...	View
<input type="checkbox"/>	Progress Monitoring - Anderson, Daniel - 12345...	View
<input type="checkbox"/>	RED - Anderson, Daniel - 1234567899.pdf	View
<input type="checkbox"/>	Speech Evaluation - Anderson, Daniel - 1234567...	View
<input type="checkbox"/>	Transfer Packet - Anderson, Daniel - 1234567899...	View

You can view your document by clicking on the View tab under the Action column of the document list.

Search Results

<input type="checkbox"/>	Filename
<input checked="" type="checkbox"/>	2016 Parent Contact Log - Anderson, Daniel - 12...
<input type="checkbox"/>	FIE Current 2017 - Anderson, Daniel - 123456789...
<input type="checkbox"/>	IEPs - An

Split Document

Share Document

View Document

Download Document

Edit Document Metadata

You can also view a document by clicking the checkbox beside the document then clicking the blue View Document tab on the right side of the screen.

Searching for Documents

Pro Tips



Link back to the document list

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

« Back to Document List

standardized testing mallory barr 222001249 Search Advanced Search

56%

1 / 1

english

Search

p.1 : 222001249 missouri end-of-course assessment [english] ii campus: district anytime isd no. pos...

p.1 : 222001249 missouri end-of-course assessment [english] i barr, mallory miss isd: 222001249 miss...

Mallory Barr Missouri End-of-Course Assessment Algebra I

Mallory Barr Missouri End-of-Course Assessment English II

Mallory Barr Missouri End-of-Course Assessment Government

Mallory Barr Missouri End-of-Course Assessment Biology

Mallory Barr Missouri End-of-Course Assessment Algebra II

Document Metadata

First Name: Mallory
Middle Name: Alexis
Last Name: Barr
Alias:
Suffix:
Date Of Birth: 11/04/1999
ID Number: 222001249
Campus: Anytown High School
Status: Active
Grade: No Grade

View Document History

Once you are viewing files, type **keywords** into the document search bar above to locate sections. Clicking on the results in the **gray box** will take you to that page in the document!

SCORE	ENGLISH	READING	MATH	SCIENCE	WRITING	TEST DATE
22	17	18	21	20	..	10/2012

PERCENTILE ON BELOW WRITING: 48

ACT NATIONAL

Searching for Documents

Pro Tips



Document History - Immunization Shot Record - Abbott, Quentin - 222001234.pdf

Time Stamp	User	Action
Jan-23-2018 03:16:54 PM	Alex Crampton acrampton.dms@yellowfolder.com	Public link shared with bguyton@yellowfolder.com Link
Jan-23-2018 03:16:0 PM	Alex Crampton acrampton.dms@yellowfolder.com	View
Jan-22-2018 10:59:51 AM	Jason Addams jaddams.dms@yellowfolder.com	Cancel CheckOut
Jan-22-2018 10:59:25 AM	Jason Addams	View

Export to .csv Done

The history can be viewed as a **spreadsheet** by clicking the **Export .csv** button

Key Takeaways

- Like any of the information you have dealt with before regarding records, confidentiality is still imperative and YellowFolder adheres to all aspects of confidentiality. Access to any type of record is determined by the user's role on the campus.
- YellowFolder is HIPPA and FERPA compliant with all employees trained regarding confidentiality laws.
- Accuracy is still key! Please ensure any information you enter on documents is accurate and complete. For example, Smith vs. Smythe will create delays in properly filing, finding or accessing documents.

Key Takeaways continued



- Any of the four record systems can be accessed from any electronic device with internet, school computer/laptop, iPad, phone. Sign-in is required in order to see your students/staff records. Please make sure to sign-out of the platform when not in use. Also allowing other employees to use your access information is prohibited.
- A digital record of access log is created each time you sign-in to a record.
- Scanning documents can be accomplished in a few ways: sent electronically from your computer, scanned at a multipurpose scan/copy machine, or from an individual scanner.

Any Questions or Additional Support/Training Needed



To learn more about the features in YellowFolder, go to www.yellowfolder.com and click on **Training** for a list of Weekly Live Training Sessions available each week. Simply register and you will receive an invitation to attend the virtual session from your desk.

Any Questions or Additional Support/Training Needed



Questions, Problems?
We're here for YOU.



Support 214.431.3600 (dial 2) • support@yellowfolder.com

Contact Support for:

- General questions about using YellowFolder
- Software support
- YellowFolder Tool(s) Support (*Droplet, Virtual Printer, Scan & Upload*)
- Assistance finding digitized documents
- Remote virtual training
- CSV file related items
- Matriculation related items
- User access related items



Record Retrieval 214.431.3600 (dial 2) • recordrequest@yellowfolder.com

Contact Record Retrieval for:

Retrieving non-digitized documents. These are generally documents YellowFolder is only storing in the warehouse (*never been digitized*). However, this also applies to documents that have not been digitized yet (*open project*).

*Completion of a Records Request Form is necessary for prompt retrievals. The form can be obtained by contacting support@YellowFolder.com or recordrequest@YellowFolder.com



Paperless Nation Engineer (PNE) *Each PNE member has their own contact information.*

About Paperless Nation Engineers:

- Educational Consultant for a smooth transition to YellowFolder
- Creation and modification of your unique File Structure
- Guidance in implementation and procedure planning to incorporate the culture change necessary to go paperless
- On-site and virtual trainings (*both initial and refreshers*) to ensure users understand how to best utilize YellowFolder
- On-going assessments of the implementation and usage of YellowFolder to inform your Administration and provide support



Accounting accounting@yellowfolder.com

Contact Accounting for: All billing/invoice related questions

PNE Contact Information



- ▶ PNE- Enter Name
 - ▶ Enter phone number
 - ▶ xxxx@yellowfolder.com

- ▶ Address:

1617 W Crosby Road Suite 100

Carrollton, TX 75006