



YellowFolder

The Education Documentation Experts

Understanding File Structures Like a Wizard

Learn about tips and strategies to maximize your file structure, while getting common questions answered.

Objective



This course is designed in two parts – common questions regarding file structures and tips/strategies to best interact with your district's file structure.

During the course the user will learn . . .

- Purpose of the file structure works
- How folders were selected for different file structures
- How to find things quickly
- Purpose of Pre-YellowFolder
- How to use the Recycle Bin-Trash folder

Checkpoint #1



File Structure vs. Search Bar



We live in a day and age with file structures all around us – such as online shopping. Pretend you need to do some on-line shopping and you want to find a product. Pick a product you want to search for and find an online vendor (for example: Amazon, DSW, Target) to look at the file structure they offer for you to search. Use the file structure to find the product.

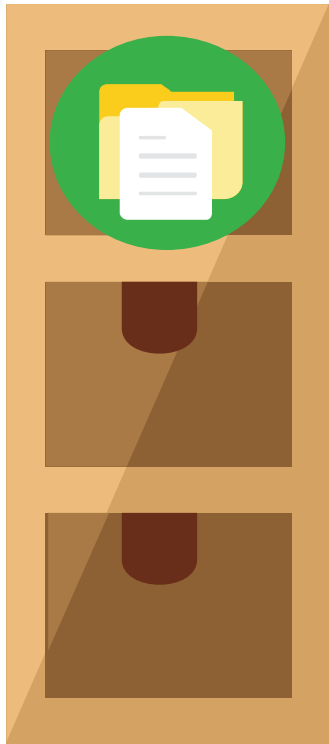
Do you prefer to search through the file structure (list) or search feature? Why?

Questions to Consider



What is a file structure?

Why is it sometimes called a FAARP?



A file structure is an organizational system of folders. The title of each folder represents a category. It is recommended that the categories be broad. Folder titles that are too specific can be limiting and add additional work for users.

As for a FAARP . . . *File Architecture, Access & Retention Plan*, it is the formal name of the file structure because it includes additional information regarding user access and retention guidelines for documents.

How did YellowFolder determine which folders for each series?



We did the research to determine which folders were most commonly used across the nation to build the file structure used today. It allows all types of documents to be filed in a systematic order and minimizes mis-filing.

So, lets look at a file structure on the next slide to see how YellowFolder created generic folders that allow for quick, efficient document placement.

Student Records File Structure Example



Think about the student registration packet, which has a number of forms. The application, birth certificate, social security card, proof of residence, etc. are all part of the registration process and they would all go to this folder, rather than having a folder for every single document.



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

YF's mission is to make your life easier!



The picture on the left is typically seen at school districts— it is expensive, time consuming and daunting when searching for a document. Compare it to the picture on the right of the simplicity and efficiency of YellowFolder's file structure.



Vs.

SPED File Structure Example

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





What is a “good folder” name in a file structure?



A “good folder” name conveys an overarching, general category that describes the contents. Something to consider, it is always best if users have a uniform idea of which documents fall into which category folder. A user should be able to recognize the document and think immediately of the placement.



Some examples are the following:





-  Student Record Series – Medical, Enrollment Information, or Academic Testing
-  Human Resource Record Series – Application Packet, Contracts, or Salary Documents
-  Special Education Record Series – Individual Education Plan, Evaluations, or Behavior
-  Administrative Record Series – Accounting, School Board, or Technology

What is a “bad folder” name?



A “bad folder” name may have confusing language, be too specific, or contain language similar to another folder name. If a user will have to debate as to where a document should be filed, then that should be a warning sign for a folder name.

Some examples are the following of file structures that have multiple files that could have documents cross placed:

-  Student Record Series – Registration, Student Information, & Enrollment
-  Human Resource Record Series – Hiring Packet & Application
-  Special Education Record Series – Evaluations, Full Individual Evaluations, & Eligibility
-  Administrative Record Series – Payroll & Employee Payroll



Why is “Pre-YellowFolder” needed in my file structure?



The folder called “Pre-YellowFolder” is included for specific purpose – making uploading faster. When a school district first starts the uploading process, it can be viewed as a daunting task. We recommend scanning in the entire folder (especially ones already created prior to partnering with YellowFolder) and placing the documents as one pdf in the “Pre-YellowFolder” section of the person. Then all new documents, created after partnering with YF, will be placed in the accurate folders.

No worries on searching though . . . the search within a document search feature allows a user to find a document within the “Pre-YellowFolder” folder.

What is the Recycle Bin-Trash folder?



YellowFolder



This folder serves as trash bin for every user. It gives you the opportunity to remove unwanted items.

Here are some examples of when you would need the Recycle Bin-Trash folder:

- 🔒 Accidentally upload a new person with the wrong ID numbers
- 🔒 Uploaded a document before it was finalized
- 🔒 Duplicate copies of documents
- 🔒 Placing non-student information in a student folder

Checkpoint #2



How did YellowFolder determine the folders for their file structures?

What documents do you have that make more sense to be filed together, rather than in separated in different folders?

What folder would you instinctively file a court custody document in:

- A) Medical
- B) Legal
- C) Correspondence
- D) Miscellaneous

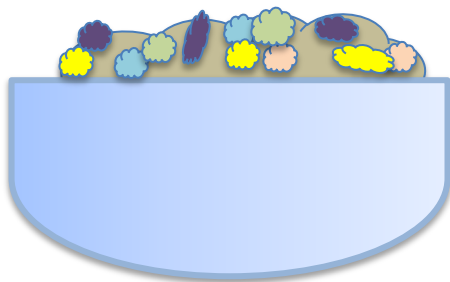
What would you upload into Pre-YellowFolder?

Tips & Strategies

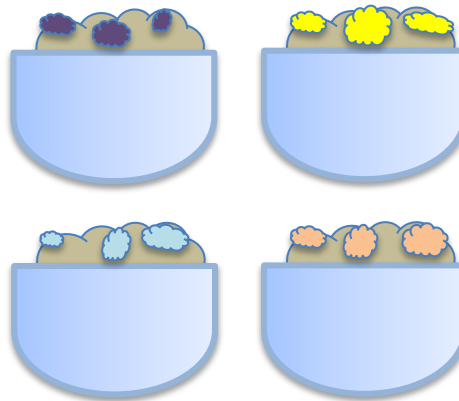


Tips: Figuring out a file structure that is just right!

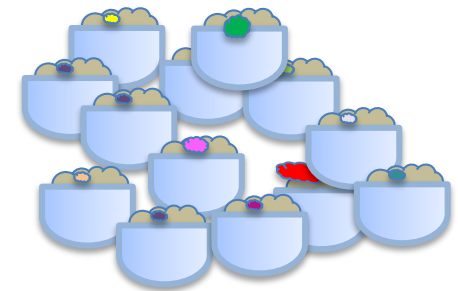
Think Goldilocks!!!



🔒 If your structure is too short, each folder might contain too many documents per student or employee making it harder to find the right one



🔒 The goal is to find the perfect middle ground where documents have one logical place to be filed, not every document has its own folder and documents that naturally go together are filed that way.



🔒 If your structure is too long, it will become hard to remember what is what, where, and how documents should be filed and found

Tips: Keep in mind how your digital filing structure works



YellowFolder

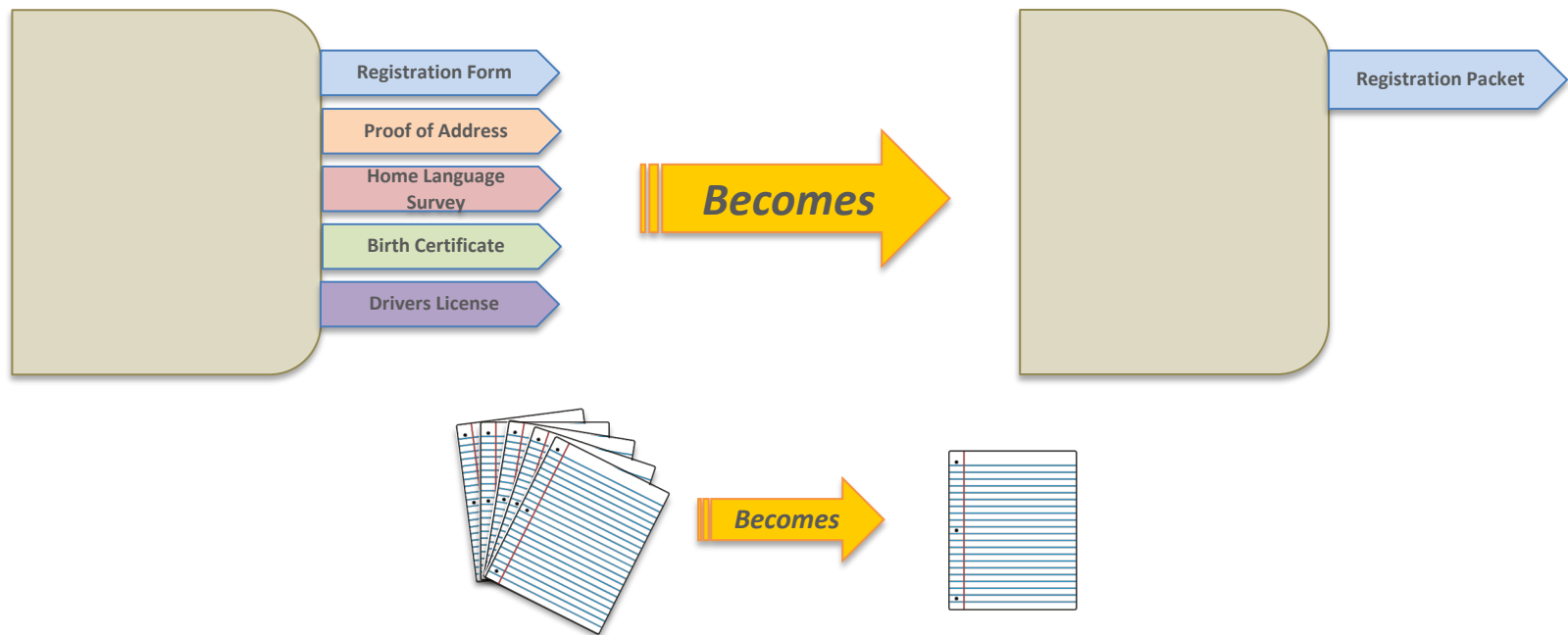
- A digital file structure does not work like your paper files:
 - Key difference #1: Documents are accessed according to Metadata as opposed to personal file. This means you can pull everyone's application at once *by clicking on document type in advanced search*, or an individual's application with the exact same amount of effort, *by adding name to this search*.
 - Key Difference #2: That same metadata gives you the ability to pull any number of documents at the same time, as long as they have at least one piece of metadata in common. That piece of data could be as unique as a student/employee name or ID#, or as generic as a word being searched in the documents. The limits are set solely by how you set things up, and the data tags that you incorporate.

Metadata: Document description tags, similar to key words, but the tags do not actually have to appear on the page

A Few More Tips... to simplify



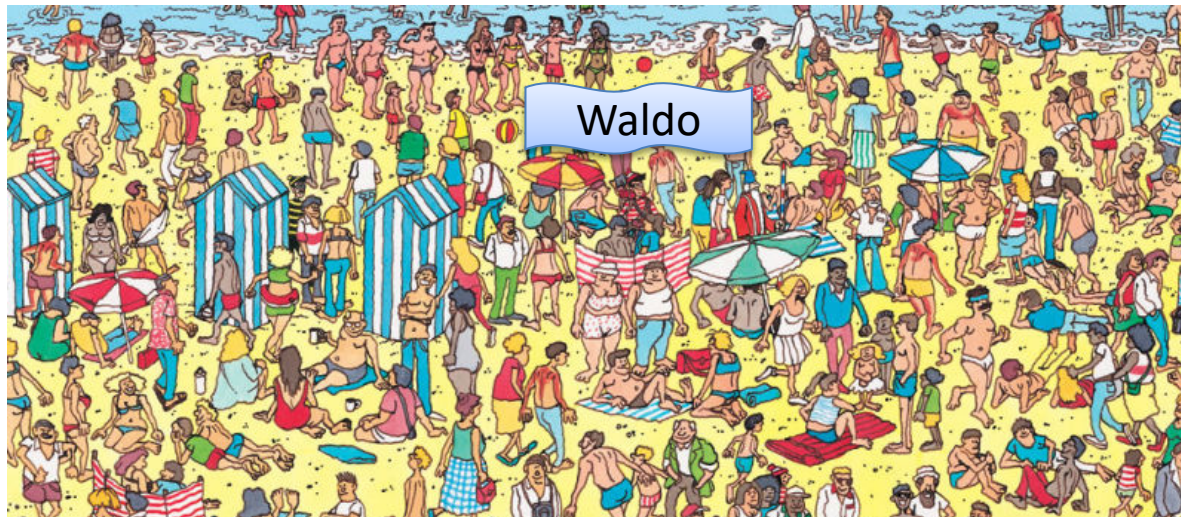
🔒 Think Packets! - Every document that you split out on its own means you will have to do the same thing when you scan or upload. If you know you will be getting certain documents at the same time, then keep the individual documents as a packet within your file structure and simplify your upload process.



Tips: You can always search by name



Every document within Student Records, Special Education, and Human Resources has to have a student/employee name attached to it, therefore it is always searchable by that name, regardless of where they are in the file structure. Therefore, using search features you can find any of your documents.



A Few More Tips...

Digital Document Storage does not work like your paper folders.



You have more ways to search, partition, and recall the information.

So why use the same methodology to store things?

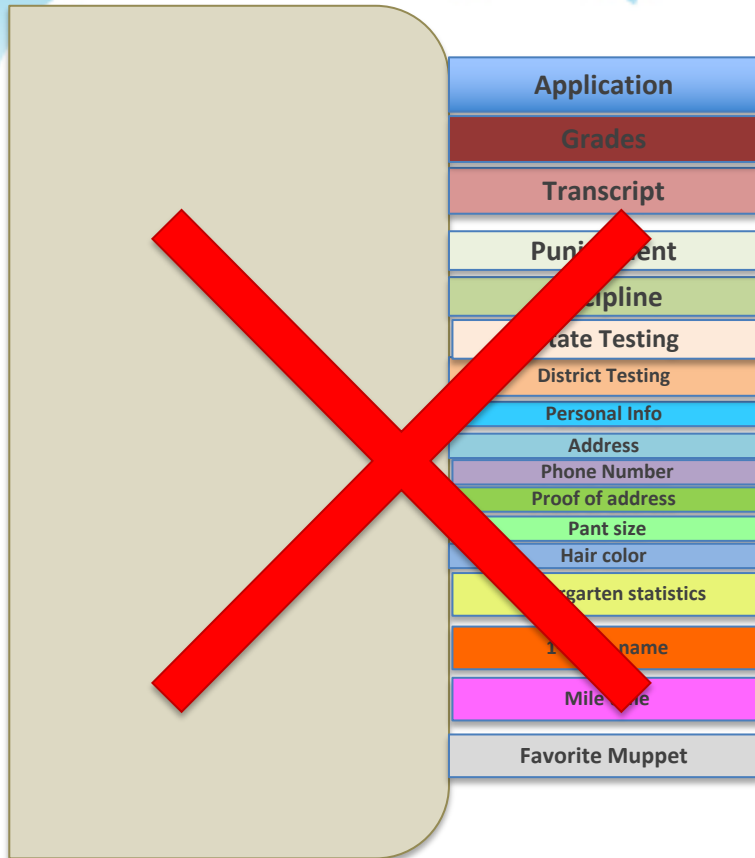


General Tips



- Use general abbreviations in the file structure, remember you might not be the only one looking for something within your file structure
- It is best to keep your file structure relatively short, as opposed to creating a file for each potential document. You can always add searchable tags to your documents by editing the document name or description to provide for easier searching moving forward.
- Work with your PNE to develop a document filing “book” that can be disseminated to everyone within your district. This “book” can be as intricate as having images for each document per doc type, or as generic as simply being a list of document names and where to file them. We recommend to get more detailed the more users you have per record series.
- If you ever find yourself searching through the file structure for a document, STOP and use the search features to locate what you need in seconds.

One Final Strategy... Less is More

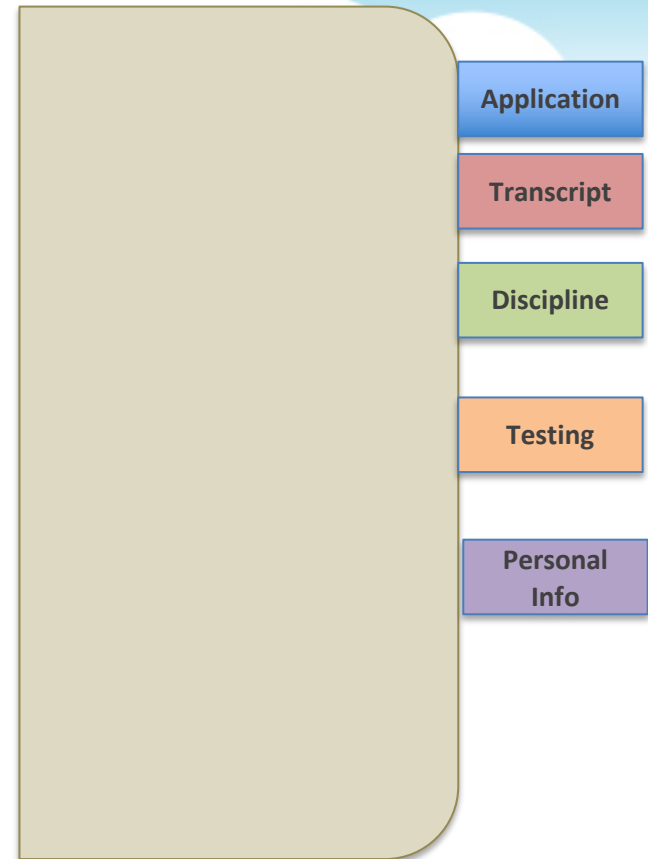


Why deal with this?

This makes sense in paper form because it allows you to easily locate a set of documents.

However, in a digital structure you can do the same thing by entering search info. Creating too many files is akin to creating a folder like this.

Simply using the search features makes finding documents fast and easy



When you can do this?

Checkpoint #3



Is it better to have a really long elaborate file structure with a place for every document or one that has only one possible folder for documents to be filed in?

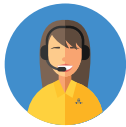
What is the importance of metadata in a file structure?

When searching is it better to go through a file structure or use the search features?

Any Questions or Needed Additional Support/Training



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

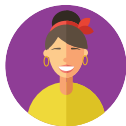


Record Retrieval 214.431.3600 (dial 2) • recordrequest@yellowfolder.com

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