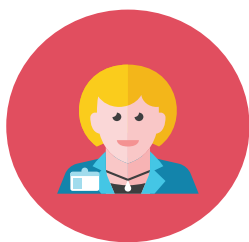**First Four Months Planning Guide for Users**
We are committed to assisting you every step of the way on your journey to becoming paperless.
The first four months of implementation are critical in proving the effectiveness of the system, therefore
we have created a guide to assist you in getting started and continuing to use YellowFolder.
Our First Four Months Planning Guide will ensure you completely understand the system
and feel comfortable using it as your electronic filing cabinet.

Basic User
The Basic User First Four Months Planning Guide is
designed for individuals who will be using the system.

Basic User First Four Months Planning Guide

Week	To-do:	Meeting with PNE:
Month One		
Week 1	❖ Log into YellowFolder prior to hands-on initial individual training with PNE ❖ Have 10 actual docs available on computer to participate in the hands-on training with PNE ❖ Attend hands-on initial individual training	Upload 10 docs during initial training
Week 2	❖ Attend Scan & Upload Training Session by registering on www.yellowfolder.com and clicking on Training tab in upper right corner ❖ Have 10 docs available on computer to practice uploading during the session	Upload 10 docs using Scan & Upload
Week 3	❖ Attend Virtual Printer and Droplet Training Sessions by registering on www.yellowfolder.com and clicking on Training tab in upper right corner ❖ Have 10 docs available on computer to practice uploading during the session	Upload 10 docs using VP and Droplet
Week 4	❖ Attend Advanced Search Training Session by registering on www.yellowfolder.com and clicking on Training tab in upper right corner ❖ Use Advance Search to search for 3 docs previously uploaded ❖ Upload 10 docs using tool of choice ❖ Email/check-in with your PNE about your uploads --- How did it go??	Email/Check-in with your PNE
Month Two		
Week 5	❖ Attend Verification/Info Required and Navigation Training Session by registering on www.yellowfolder.com and clicking on Training tab in upper right corner ❖ Verify a minimum of 15 documents in your Verification Required section ❖ Provide needed information for any documents in Information Required section ❖ Have 20 docs available on computer to practice uploading with PNE ❖ Develop a goal for yourself for weekly upload numbers and share with your PNE	Upload 20 docs – user choice Email goal to PNE
Week 6	❖ Attend Edit Document Metadata Training Session by registering on www.yellowfolder.com and clicking on Training tab in upper right corner ❖ Edit the metadata on 3 docs previously uploaded ❖ Upload 20 docs using tool of choice ❖ Email/check-in with your PNE about your uploads --- How did it go??	Email/Check-in with your PNE
Week 7	❖ Attend Renaming a Document Title Training Session by registering on www.yellowfolder.com and clicking on Training tab in upper right corner ❖ Rename 3 docs previously uploaded ❖ Upload 20 docs using a tool of choice	
Week 8	❖ Practice uploading as many docs as you can	
Month Three		
Week 9	❖ Attend Sharing Training Session by registering on www.yellowfolder.com and clicking on Training tab in upper right corner ❖ Share 3 docs previously uploaded	Upload 40 docs – user choice Email goal PNE

	❖ Scan 40 docs to be uploaded with PNE ❖ Share your progress on your individual upload goal with your PNE and challenge yourself to increase	
Week 10	❖ Practice uploading as many docs as you can	
Week 11	❖ Attend Splitting Training Session by registering on www.yellowfolder.com and clicking on Training tab in upper right corner ❖ Split 3 docs previously uploaded ❖ Scan 40 docs to be uploaded with PNE	Upload 40 docs – user choice
Week 12	❖ Practice uploading as many docs as you can	
Month Four		
Week 13	❖ Practice uploading on your own ❖ Share your progress of your individual upload goal with your PNE	Email goal to PNE
Week 14	❖ Practice uploading on your own	
Week 15	❖ Scan 50 docs to be uploaded with PNE	Upload 50 docs – user choice
Week 16	❖ Celebrate your 4-month success with your PNE	Email/check-in