

As seen in the "Ask the Organizing Expert" Column in the Lake Oswego Review and the West Linn Tidings

Organizing Your Papers and Files

QUESTION: My New Year's Resolution was to get my papers and files organized. Can you give me some tips to get started?

Managing your papers and files reminds me of a factory. I've always been fascinated with factories, especially the ones with big viewing windows where I can watch all the moving parts and see the product click along the conveyor belt. Designed to process, store, manufacture and deliver consistent results, factories are the epitome of efficiency. Your own paper management system can utilize these same factory concepts and produce results that save time, save money, and reduce stress.

The Delivery Dock: The Delivery Dock is where paper funnels into your home. Items from the mailbox, car, backpack, purse and pocket should all be delivered to one location – perhaps a bin or box in your kitchen. Process these papers into one of only two piles: *toss or keep*. Open all mail and toss envelopes, inserts and fillers. Discard or recycle the tossed items and move the keepers to your desk or office. This task alone should reduce your paper pile by 2/3!

The Processing Plant: Papers that survive the Delivery Dock are now ready for the Processing Plant. Again, process the papers into two piles: *file for reference or file for action*. If you despise files, hang in there! "Files" are simply "homes" for papers; they can be cubbies, drawers, baskets or bins. Whenever possible, try to keep your files vertical (visible) rather than horizontal (hidden). Experts say 80% of what we file is never referenced again, so feel free to toss a few more items during this processing phase.

The Warehouse: Files for reference (items that require no action other than to be kept) need a good Warehouse, usually a file drawer or cabinet. Your files are only as good as your ability to retrieve them, so file names and categories should make sense to you. Choose a few main categories (Financial), subcategories (Credit Cards) and individual subjects (Visa). Hanging files are a must, color is fun but optional, and straight line filing (keeping all your tabs in a row) keeps everything tidy.

The Production Zone: The Production Zone is your desktop, and action files can live right on top in a hanging file box or vertical file sorter. Don't allow "out of sight, out of mind" fears to halt your productivity. The key to filing action papers is to *note the next step and write it on your calendar*. Then file the paper appropriately in an action or project file. Examples of action files are: to pay, to call, and to read. Within the "Production Zone" should be a small "Packaging Plant," well-stocked with envelopes, stamps, and address labels.

Quality Control: A smooth-running paper management factory will require annual inventory control. Purge your files of unnecessary papers while preparing your taxes. Fine tune your file categories if desired. See www.irs.gov for a list of retention guidelines.

Factories were a result of the industrial age, but the concept of controlled, repetitive practices serves us well in the information age. By systematically moving paper through your house, you will pay your

bills on time, access info as needed, and complete projects. When the whistle blows at day's end, enjoy dinner with your family; the paperwork is finished!

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