KatyHomeOrganizer

a Professional Organizing service

Home Office **Paper & File Management**

Answers the Question:

"What do I do with all this paper?"

About the author

Maureen Guzman

Maureen Guzman has been organizing her entire life, and has spent that past several years honing that skill. A real *get-it-done* kind of person, Maureen has never met a challenge she couldn't handle. With her common sense approach and zen-like life philosophy, Maureen gets others organized and helps simplify their life. You can keep up with Maureen through her Facebook, Twitter, Linked-In and Pinterest accounts.

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CHAPTER 1:
Where does the paper come from?

Snail Mail…

The Office is an area that many people struggle to keep in check. If that sounds like you, you're not alone, and in fact are quite normal. When you think about the reasons why our offices become overrun, it's easy to understand how it gets that way.

Mail is one of the biggest culprits. We get so much paper every day. We don't ask for it, yet it keeps on coming. Day in, day out we can go the mailbox and know *for certain* there will be a piece of paper, or many pieces of paper in there. It's a relief when Sunday comes around to know we get a reprieve. So every day we have to make a decision about what to do with this piece of paper that we didn't ask for. It is truly annoying, and can become a resentment at *whoever* keeps sending us this stuff!

photo by Golden Eel

Why hang on to it?

But *WHY* do we feel this way? Why can't we just make the decision to throw it all away and be done with it? That seems like the logical route to take; but somehow we still end up with unsolicited papers cluttering our life. I have a theory, a few theories actually, as to the root reasons, and they all have to do with the type of mail we are receiving. It boils right down to advertising.

"We might need it."

Almost everything we receive, except for any personal mail, bills, or something we have requested, is an advertisement.

Someone is always trying to sell us something, be it a product or service. As a society, We are conditioned to feel obligated to respond to advertising. We feel enticed to think that we need whatever it is that is being presented to us, or we might need it in the future.

We know it's a game, but no matter how hard we try not to "play", we are still suckered into it. We will hold onto the advertisement because "we might need it". So in the office it goes (or whatever space you deem "office space").

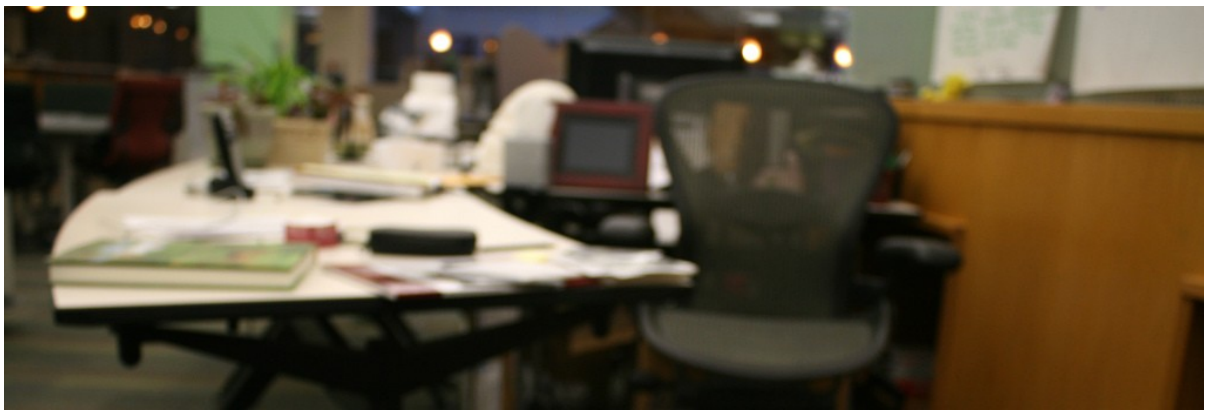


photo by Quinn Anya

Other stuff too

The other thing we will get in the mail is informative items. Things like the most resent assessment of our water supply from the Utility District, or new additional policies the bank or credit card company is required by law to inform you via mail (regardless of whether or not you opt for paperless billing or statements). Occasionally we need to read this stuff, but not always on the day it arrives, so we need to keep it. So in the office it goes.

Then there is paperwork that comes home with our kids, or from work. What do we do with that stuff? How do you keep that from taking over?

I see all this time and time again with all kinds of people. People who work full time, people who are single parents, people who are retired, people married with families, stay at home moms; they may all have different life styles, but they all share the same problem. For all, the solution is the same: **Have a system in place**. A way to receive papers and a routine of how to follow through with handling all them.

It's all in your mind…

I know, I know it sounds simple enough, but how in the world do you put it into practice? One of things that makes solving this particular dilemma so challenging, is it takes some experimentation to find what works the best, some self reflection to hone in on what *really* is working and what isn't, changing some habits to incorporate new ones, and a bit of diligence to see it through to the end.

That's why there are SO MANY products on the market; videos, how-tos, and methods available. Everyone is different, thinks differently, process things in their own unique way. I think the office, unlike any other space or concept, reflects these subtle variations the most. The *mechanics of the mind* are at play here – not the mechanics of how a space functions. Much of the organization takes place in the mind – the intangible place that is oh, so complicated. Then when you add another person into the mix – watch out! It becomes even more complicated!

CHAPTER 2: Keep it Simple

The best strategy is to keep things as simple as possible. Cater to the lowest common denominator, refraining from becoming so detailed as to weigh the process down.

Implement a system

You need a system, and you need to use it.

In our house I am the only one who handles the paper/mail. Occasionally someone will I bring it in, but beyond that it's up to me. I don't like to get bogged down in the minutia when it comes to organizing – or filing – paper. I want it off my list of things to do as quickly as possible. I want it to have a place to reside until I am ready to touch it. And I want that place to look neat and tidy.

It has taken years to figure a system out. I have tried so many different things, but it wasn't until I *really* paid attention to my own personal habits – not what I *wanted* them to be, or thought they *should* be, but what they *really* are; without judgment of performance or habits, and without expectation – did I make a breakthrough.

That was when I found the filing system that fit the best (and it is what I suggest to my clients), and the paper management system that works the best for me.

Paper Flows In

So here is the flow to my paper management.

Sort: As I am walking to the house I am already sorting it to determine what I can get rid of straight away.

Recycling Bin: By the time I hit the front door, I am done. I go straight to the recycling bin and toss what I don't need.

Holding Zone: The holding zone is just that. The mail and papers that do not need my immediate attention go there until I am ready to take care of them. They are out of the way, and in a place where I will not forget them.

That's it: The mail/paper is out of my hands, not someplace random and waiting for me to come back to it when I'm ready.

my holding zone

If it is something that I must do fairly immediately, I will put it *beside* my desktop filer. Other places it has gone are:

- fridge
- front door
- hall mirror
- microwave

All of these have worked. I didn't forget them, and that is what was important. *Find what works for you*. The key to this is that it does not get lost *visually* in a sea of other papers.

If my fridge is crowded with other things, then putting an important paper there would do no good. I won't see it. It has to be somewhere I will be able to see it. That's why it has also appeared on the front door or on the microwave. It won't be there forever, and that's the point.

my fridge door - too crowded today

Tending to my Mail

When I am ready to tend to my mail/papers, it's pretty simple. As I go through it I am deciding:

- What needs action: bills, things to pay or respond to.
- What needs to be read?
- What can be filed immediately?

Here is a picture of my desktop filer that only has the files I access frequently. I have a more detailed and thorough filing cabinet that I do not use as often, but that I need. More on that later.

my desktop organizer

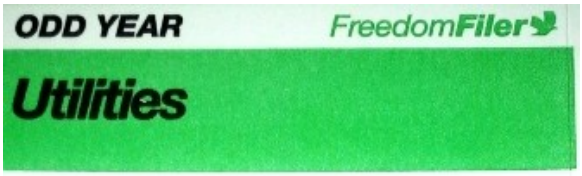
CHAPTER 3: the Filing System

When I am ready to tend to my papers I only have a few categories to choose from, and that is what I like. Anything that is a bill that needs to be paid goes into the gray file – **To Be Paid**. This also is the file for our budget (gold tab). So anything that involves a payment, which also involves my budget, goes there.

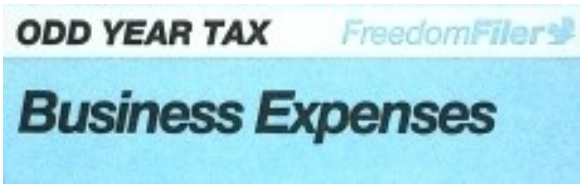
the files in my desktop file are simple

If it's something I just need to read – like the water assessment report – it goes into the gray **Reading** file. If it's one of those alluring, irresistible advertisements that I just must keep, it goes into the gray **Coupon** file. So far, all the random bits of paper and mail have been put in a location. I usually tend to this weekly. I have already reviewed it all, so I am aware of what I have received, but it is not longer cluttering up my space. It is waiting patiently for me to take the next action, whether that be to pay it, read it, or use it.

After I pay a bill, it will usually go into my green file. It's marked **Utilities**, but for me that is anything that I pay for monthly. That includes my car insurance and my mortgage statement. I receive my bank statements and some other bills online, so I don't have to worry about those.



Anything that comes in that will eventually be related to my taxes, I will put in one of the blue tabbed files. I keep this really simple. **Tax Year 3** file is all for taxes. Since I will have to add up all my medical expenses for the year, I keep those in a separate blue **Medical** file (for tax purposes only), and then I also have my **Business Expense**s, also in a blue file.



I use Freedom Filer

Everything else goes into a gray **TO FILE** folder. These things will eventually go into my larger file (see photo). I don't need to file very often, but when I do it's super quick and easy.

I use this system for my home and business and recommend it to my clients. What I love most about my filing system is that it is color coded. I didn't invent this, but I love it. It's simple, logical, and self purging. That means you will know when to throw things away. It's built into the system.

The next page gives you a brief overview of the colored tabs used most often.

my larger file for less frequently used files

Follow this link for more info on Freedom Filer.

Colored Tabs

The red tabs are for things that are basically permanent, like medical records, employment history, birth school history, or marriage certificates, and the like.

The gold tabs are for anything that might be replaced at some point. Like insurance policies, contracts and the like.

The green tabs are also a two year rotation. So in 2014 when I pull out my even year Utility file, I will throw away whatever is in there because I will not need it.

Blue always relates to taxes, and because this system has a two year rotation, my 2012 stuff sits in the way back of my file until 2014 rolls around. At that time I just throw away whatever it in the file. The exception would be anything that I used to do my taxes with. All my completed taxes are in a dark blue file and are kept for 10 years.

Another great thing about this system is it's *customizable* to what YOU need and want.

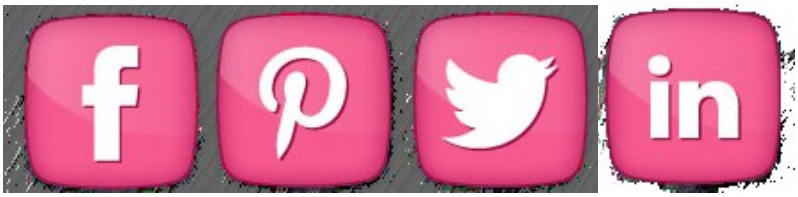
Hire an Organizer

If you struggle with paper management, I hope this ebook gave you some insight to where it all comes from, as well as some tools to help you get it under control. If you would like me to come help you set up a paper management system, it would be my pleasure. It's easy to reach me:

CONTACT ME

832-978-1482

and you can find me on
Facebook, Pinterest, Twitter, and LinkedIn



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