

Organizing Paperwork and Cutting Paper Piles



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Organizing Paperwork

Keep in mind: a filing system is only effective if you can find everything you need, when you need it—*without a struggle*.

Steps to Cutting Paper Piles

The key to cutting back on paper clutter in your home is to reduce the incoming paper and then to create regular places to store the necessities that find their way to your home.

#1 Have materials on hand. Purchase filing materials, such as hanging file folder, accordion folders, hanging files, labeling materials and filing container(s).

#2 Gather all boxes, baskets, and piles of papers to be filed in one location.

#3 Go through items to be filed a little bit at a time. Perhaps designate 15 minutes a day until it becomes more manageable. Have a garbage can handy—you'll be throwing out a lot. If a document is absolutely critical, and you are sure you'll need it again, then it needs filed.



#4 Label files as you go. File in alphabetical order. Keep it simple. Create a file and file alphabetically.

#5 File new items immediately. This is key to keeping filing system up to date. One item doesn't take very long to file. If you really don't have time to make a new file, place in a shallow basket or tray near the filing cabinet and get to it soon.

#6 Make a mail and filing station. Create a location where stamps, calculator, pens, envelopes, etc. are always to be found. Consider making room for this near your

filing station to make it easier to file a bill after writing the check for it. Let all family members know where it is and what items stay there.

#7 Reduce the filing demand over time. This can be done in many ways.

- ⇒ Sign up to pay bills online. Ask your bank about automatic bill pay. Sign up for bank and credit card statements online.
- ⇒ Open mail as you bring it into the home. Open it over a trash can and throw away what is not needed.
- ⇒ Evaluate your magazine and newspaper subscriptions. Are you paying for something you never get around to reading? Keep only those you read regularly.
- ⇒ Cut the coupons. Expired and never-to-be-used coupons should be thrown out. If you do use them, consider a filing system for them.
- ⇒ Keep only the receipts you need to reconcile the coming statement or for tax purposes. Toss the rest.
- ⇒ Begin storing more information on the computer and create a backup file on a CD or a flash drive.
- ⇒ Regulate files yearly. Throw out (or shred) outdated information. Make room for next years' paperwork.

Where to Store Important Documents

Safe Deposit Box	Fireproof Box at Home or Home Filing System	Attorney or Relative or Friend (as applicable)
Automobile Titles**	Cancelled Checks**	Burial Instructions**
Birth/Marriage/Death Certificates*	Bank Account Statements**	Living Will*
	Medical History*	Will (copy or original)**
Citizenship Papers*	Warranties**	Power of Attorney*
Burial Lot Deed**	Living Will*	Trust Documents**
Personal Property Inventory* (update annually, place copy in home file)	Employment Records *	Copy of Personal and Professional Directories**
	Passports**	
	Power of Attorney*	Copy of Personal Property Inventory*
Education Degrees*	Original Will**	
Legal Documents*	Trust Documents**	
Property Deeds and other Real Estate Documents*	Insurance Policies and Record of Claims*	
Divorce and Custody Documents*	Inventory of Valuable Papers*	
	Recent Tax Records*	
Military Documents*	Back Tax Records*	
Stocks and Bond Certificates**	Record of Auto Service and Repair **	
Audit Records *		

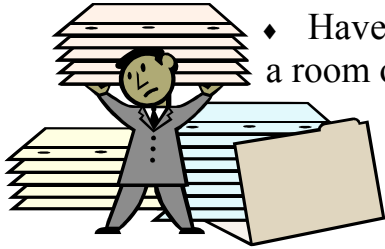
* Items to be kept “permanently” ** Items to be kept only temporarily (for the duration of ownership or until updated)

Papers to Throw Out

- Receipts not necessary for tax or warranty purposes
- Warranties and manuals for items you no longer own
- Coupons that have expired or that you will never use
- Recipes you haven’t used and don’t plan to
- Copies of magazines—cut just the articles you would like to keep
- Pieces of schoolwork your children did—pick just the important ones or take a photo of them.
- Event announcements that have passed
- Any outdated information or papers that have no purpose

Other Ideas For Paper-Pile-Free Living

- ◆ School projects and artwork can take up a lot of space. Consider giving each family member a tote or box to keep their favorites and then photograph the rest and scrapbook or store on CD or flash drive.



- ◆ Have a Weekly Wall of Fame in the form of a bulletin board in a room or play area. Every week or so tack up children's artwork or awards they bring home from school. Then file what to keep, or photograph and toss.
- ◆ Keep only the most important and meaningful cards—birthday, sympathy, invitations, etc.
- ◆ Have a message system. Have one place in your home where a pencil and notepad are always available. Post messages to one another in the same place every time. Keep your address book near a phone.
- ◆ Hang or place a basket near the front (or back) door and place your keys in it so you'll always know where they are. Place bills and letters in the basket that need to be mailed. When you grab your keys, you'll remember the mail.
- ◆ Consider using a rolodex or making a similar file instead of an address book or sticky-notes. To make one, buy index cards and an index card filing box. The index cards offer a little more room for names, addresses, phones, emails, birthdays, etc. and are more easily replaced and kept current.



Adapted from:

- *How to Organize Your Household Papers*, available at:

<http://home.howstuffworks.com/how-to-organize-your-household-papers.htm>

- *How to Simplify Your Filing System: or, Why Stacking Just Doesn't Work* available at:

<http://znehbits.net/2007/07/how-to-simplify-your-filing-system-or-why-stacking-just-doesn't-work/>

- Sarah Aguirre, *Organizing Family Records and Documents*, available at:

<http://housekeeping.about.com/od/getorganized/a/familyrecords.htm>

- Sarah Aguirre, *10 Easy Steps to Reduce Your Piles of Paper* available at:

<http://housekeeping.about.com/od/organizing101/a/tentipsrdcpaper.htm>