

3 Tips on How to Organize Your Paperwork

Here's how you can keep your paper flow under control by developing an easy retrieval system.

Sorting Paper

1. Don't put the stack of mail down until you have sorted through all of it. Use the F.A.S.T. method (File it, Act on It, Schedule it on your calendar, and Toss it (or delegate it to someone) for each piece of paper you touch. You'll be amazed by how much time you'll save with this tactic alone!
2. Cut out only the sections that you're interested in the magazine or newspaper and place in your file or reading stack—don't save the entire newspaper or magazine (recycle the paper you don't keep). Consider scanning the articles if you plan on keeping them for a long period of time creating file folders on your computer for those articles. In most instances, you can find the same information on the Internet.
3. Remember, ***shred documents with personal or sensitive*** information with a cross shredder.

Filing System

The most important feature of any filing system is the user's ability to easily retrieve information.

1. Consult your tax advisor or IRS Publication 583 "Starting a Business and Keeping Records" (www.irs.gov) that will tell you how long to keep your papers.
2. Make sure your "keep forever" documents are safely stored. An all metal safe deposit box will bake your documents brown and destroy them, while a cement-encased safe will keep your documents intact.

Catching Up

1. Make a quick pass through the piles, sorting into "toss," "active," "nonactive" (storage like taxes, birth certificates, IRS returns, etc.), and "reference material" stacks.
2. File the "active" pile into: filing, data entry, meetings, etc.
3. Sort the "nonactive" pile into labeled file folders to be stored.
4. Set a timer for 10-15 minutes and do your filing at least twice a week. (Use an A-Z Desk File Sorter to presort your filing).



Remember the next time you go into your office, "If you can't find an item in 30 seconds, it's in the wrong place."

item

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