

The Great Paper Shuffle

By Sara Caputo, MA

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80% of papers that are filed are never looked at again! That statistic is hard to believe, but knowing what to file and what to toss is a question that plagues everyone these days. As an organizing consultant, my work takes me into the depths of the paper shuffle and it's my job to help people sort through their papers and create systems for what they decide to keep. The number one statement I hear from my clients is: "I don't know what to toss or what to keep, so I end up keeping everything!" This can lead to an overwhelmingly amount of paper confusion. Following are some general rules on how to go about tackling your piles of papers.

1. **Sort by category.** Always use sorting as your starting point as it allows you to go through each paper to see what you have in order to make decisions on what you do and don't need. How do you know what to keep or toss if you don't know what you have? Make a pile for "keeping" and pile for "tossing". Make sure to shred the papers that you decide to toss if they contain any information that can trace back to you, such as account numbers, names, addresses. In general, keep any tax related items for 7 years, but always check with your CPA if you are not sure.
2. **Create a system.** For the papers that you choose to keep, create a file system that is in line with your current life. It becomes very confusing to try to continue with a system that you used years ago and no longer reflects the current state of your life. Build on the parts that are still current and tweak the parts that no longer reflect your current life. For instance, if you have old accounts that you have closed or past paperwork that no longer applies to your life, toss it. The golden rule is that your system should be in place to support you, not frustrate you. If you find yourself frustrated every time you go into your filing cabinet, then it's time for an upgrade.
3. **Use the correct tools.** Using the right organizational tools to help keep papers organized is imperative in the creation and maintenance of a user-friendly system. Four tools for creating great filing systems include: hanging files, insert files (1/3 cut), labeler, and post-it notes. An easy to use system includes the use of hanging files as the main category heading and insert files for the categories within the main heading. For example: If the main heading is insurance, then that is the title that goes on the hanging file tab, while all insurances that pertain to your life would go under that heading, such as life, health, auto and home. A labeler is handy to use for labeling tabs clearly, creating files that are easy to read at a glance, and post-it notes are great to use in the interim for keeping everything pre-sorted in proper categories if you can't finish it all at once.

- 4. Work the system.** Once your new system is up and running, it might take a few weeks or months to find your pace and work with it. Always change things as you go if they are not working for you. If you find that piles of paper still abound in your home, even though you have a great system, ask yourself why you aren't working the system or how you can refine it to work better for you. Also, educate others about your new system for papers if you are not the only one that will be using it. Lastly, purge your system at least once per year. Get rid of old receipts, statements and other documents that no longer apply to ensure that your files don't get too out of control. Keeping up with your system by purging on a regular basis is critical to maintenance.

Remember that organizing projects always get worse before they get better, but it will never get better if you don't work at it, so instead of tackling it all at once, choose times in your day when you are most energetic and productive. Also, it's best to work in small chunks to avoid getting overwhelmed and throwing in the towel. By working at it bit-by-bit, you're sure to get through your paper piles and create a system that works for you. Now that you have some guidelines for how to sort through papers, as well as create a permanent system, your papers and piles will be much more manageable in the future if you work the system and maintain it!

About the Author

Sara Caputo, MA is a productivity and organizing consultant who has been streamlining environments and simplifying lives for years through consulting, coaching, and training. Sara is the owner of Radiant Organizing, a professional organizing & consulting company, based in Santa Barbara, California.

She is passionate and dedicated to helping people create more space in their lives for the things they love. Sara's commitment, intuition, and facilitative approach to organizing has helped numerous businesses and individuals pave their way towards living more productive and balanced lives. She believes that by creating more order in our lives and eliminating unnecessary chaos, we can participate more fully in all levels of life!