



Organizing Paper

Practicality is key -- Perfection is optional!

What causes paper overwhelm?

- Too much paper mail
- Lack of systems
- Lack of time
- Fear: What if I need it?

Before you start

First consult with your accountant, lawyer, financial advisor, physician and any other professionals about how long you should keep your documents.

Junk Mail: How to stop it

Catalogue Choice - stops mail delivery of catalogs, coupons and credit card offers, donation requests, <https://www.catalogchoice.org/>

DMA Choice - stops general junk mail, <https://dmachoice.thedma.org/>

Opt Out Prescreen- stops credit card and insurance offers, <https://www.optoutprescreen.com/?rf=t>

Dex - opt out of your phone directories, <http://www.dexpages.com/index.php?RelId=6.8.1.4.6>

PaperKarma- get rid of junk mail using your cell phone, <https://www.paperkarma.com/>

Non-profit mailings - If there is a contact number, you can call and ask them to remove your name and address from their mailing lists.

Eliminate paper bills and statements

Sign up for automatic bill pay and automatic banking.
Download the statements onto your computer.

Eliminate paper manuals

Whenever you purchase an appliance or electronics, download a copy of your manual onto your computer. Then recycle the paper manual.

Manuals online - <http://www.manualsonline.com/>

Manuals lib - <https://www.manualslib.com/>

By the way, you don't need the warranty card. It is just a way for the company to get you on their mailing list.

Daily mail routine

- Pick a convenient location for your mail.
- Place a recycling bin by your mail station.
- Sort through your mail. Recycle all unwanted mail. Move important mail to your desk or wherever you pay your bills.
- Set aside a day and time to go through your mail and pay bills. Note it on your calendar.
- Be consistent!

Newspaper clippings and recipes

Use the Internet to look for your article online. Save as a PDF or link onto your computer. You can also use Evernote or your computer's notepad to save the article or the link to the article.

Receipts

With the new tax laws, you should check with your accountant regarding which receipts to keep or toss. Keep receipts for the following:

Home improvements
Business expenses
Medical expenses

Tax purposes
Home inventory

Tax documents

Consult with your accountant on how long you should keep tax records. Before you are ready to discard your supporting documents, keep or scan your 1040, your state tax return and your W-2 forms.

Warning!

With the new tax law you may need to keep copies of checks for tax-deductible items you have paid. You will need to download copies of your checks into a tax folder and keep them for your tax return. Discuss with your accountant how the tax law changes will affect you and your paperwork.

Pilers vs. Filers

Pilers see things that are visible. For them, out of sight is panic.

They should:

- Keep files corralled yet plainly visible, using a rubber band, envelope, file folder, etc.
- Separate bundles of papers with a colored sheet of paper, preferably card stock.
- Use bulletin board or magnet board to keep crucial notes and documents from getting lost in the shuffle.
- Use a mail sorter to keep your files sorted vertically.
- Use baskets without lids. Label the baskets

Filers

Filers typically see with their minds. For them, out of sight is peaceful.

Notes

Keep your notes on your electronic devices. If you prefer paper, keep a spiral notebook at your desk. Use Post-Its. Avoid loose pieces of paper for notes.

Attention Deficit Disorder (ADD) and Executive Function Disorder (EFD)

Our Executive Function helps us manage our lives. When it fails we have difficulty analyzing, planning, organizing, scheduling, and completing tasks. For people who have ADD or EFD, paper management systems should be kept as simple as possible. A container with a cover may act as an obstacle. All obstacles (covers) should be removed.

Containers and supplies

- Baskets
- Tickler file
- Stadium file box
- File cabinet
- Rolling cart
- File box for storage
- File labels

File Folders

- Visual Clutter – in paper management, visual clutter can be defined as having too many conflicting patterns in the same area.
- Color vs. plain - Color or patterned file folders are not for everyone. For some people, however, color or patterns might encourage them to file.
- File folder tabs - If the tabs are just willy-nilly they may cause visual clutter making it more difficult to find the file you need. Tabs lined up behind each other make the file folder easier to find.

Organizing your papers

- General Sort - Divide your papers into three piles: Action, Recycle, File (ARF)
- Place "Action" papers into a Tickler File
- Sort the "File" pile using "like with like" or divide into categories. Your categories depend on how you think. They can be as detailed as you like. You can just use general categories such as: Cars, Family, Financial, Home, Investments, Legal, School, Taxes, Utilities. Or, you can have files for each sub category such as Credit Cards – American Express, Visa, Master Charge, etc.
- Have a home for all your incoming papers.
- Set a regular time to go through your papers.

Electronic Filing

Your hard drive should reflect your paper filing system

Maintenance

- Check your retention schedules
- At the end of the tax season, pull out your tax file and store it.
- Shred anything that you no longer need.

Equipment

Label maker
Shredder
Scanner

Remember: 80% of what we keep in our filing cabinet we will never use again!

RESOURCES

Links

Catalogue Choice – cataloguechoice.org

Opt Out Prescreen – credit card and insurance offers, OptOutPrescreen.com

DMA Choice – direct marketing mail, dmachoice.org

Edelman Financial Engines - [Important Document Checklist](#)

Paper Karma – use your phone to get rid of junk mail, paperkarma.org

DEX, 1-877-243-8339

YouTube videos

Tracey Bowers, Simple Home Filing Systems, <https://bit.ly/2xZKQsv>

How to ADHD, Overwhelm Part 2: How to Fight the Paper Monster, <https://bit.ly/2NMyDLH>

Marble Jar, My ADHD Brain: Single Stream Paper Organizing, <https://bit.ly/2OrhNBk>

Smead, Setting Up An Effective Home or Office Filing System, <https://bit.ly/2NiIHag>

Smead, How to Set Up a Basic Filing System, <https://bit.ly/2DHexhf>

Reading

Additude Magazine, <https://www.additudemag.com/>

Consumer Reports on warranty cards, <https://bit.ly/2m3G18j>

Supplies

Smead Tickler file, <https://bit.ly/2MOIf2U>

Smead Stadium file, <https://bit.ly/2RzJxT1>

Staples Mail Sorter, <https://bit.ly/2IUQeeQ>

Paper organizing ideas

Pinterest.com