

FILING TIPS

DON'T "MICRO FILE"

When setting up any filing system, use general categories to make filing simple. For example if you are filing backup for bills you have paid, resist the temptation create files for each utility company and credit card when it may be fine to simply have a "paid bills". You are more likely to utilize a system that is simple.

CREATE A FILE INVENTORY

In the front file of one drawer, there should be a file inventory sheet. This is simply a quick list of what is in the file drawers and could also list any items that are archived in boxes by just listing the box # and contents. This makes retrieval easy and helps people that are concerned that they will lose track of things that are not visual.

LEFT- CENTER- RIGHT TABS

Instead of tabbing each and every folder left-center-right. Group all the files A-H on the left, I-R in the middle and S-Z on the right. That way when you add additional files the tabs are still aligned well.

VERBING FILES

It is highly effective to think of the next action that you need to take when retrieving your files and name them accordingly.

RED HOT

Create one HOT file and use a red folder. This is for that paper that you can not lose. Give it a safe haven in this unforgettable new home.

HOLD FILES

I use a HOLD 6 MONTHS file and a HOLD 1 YEAR file to help purge temporary files effortlessly.

EVEN/ODD SELF PURGING FILES

This system has duplicate files set up for even and odd years in two different colors and permanent files in a third color. Here is an example of how it works: File all the temporary records for 2004 in the even files and permanent record (ex: taxes) in the permanent files. Then file 2005 in the odds year files until you get to 2006 at which point the 2004 can be sorted and decluttered to start fresh with 2006.

ACCORDIAN FILES

This is a simple way to file active household information. You can keep each year in one file and when taxes are complete, wrap up one file and put it in an archived space and start a new year. This helps avoid the problem of pulling out last year's files and developing new files each year. It self purges because when you put one year into storage you toss one file that is seven years old.