

A PRIMER FOR PAPER FILING SYSTEMS

INTRODUCTION

There is no such thing as a “one size fits all” filing system. A good filing system is one where you are able to find what you need when you need it. What follows are three possible approaches; choose the method that makes the most intuitive sense to you.

1. **Category Based:** File like items with like items, by subject. (e.g., Finances, Medical, Cars)
2. **Index Based** :Identify files numerically, by item. (e.g., File 1=Document 1)
3. **A to Z Based** A simple system where you file alphabetically by topic, author, or company.

CREATING A CATEGORY BASED SYSTEM

1. Compile and sort your papers using the FAT™ process (**File-Act-Toss**).
2. Start with your **Act** papers and integrate them into your calendar, your tickle file and/or your action management system.
3. Next, separate the remaining papers into **Reference** and **Archive** piles (continue to look for papers that would be safe to “Toss”- the less you store, the easier you will be able to access the papers you truly need). Remember “Clutter is Postponed Decisions™”.
4. Sort respective Reference & Archive papers into categories. (Possible categories listed below)

Automotive	Home	Retirement
Education	Insurance	Taxes
Family	Legal	Travel
Financial or Banking	Real Estate	Warranties
Health and Medical		Work

5. Use categories that are broad for sorting. For example, if you have lots of information on various leisure activities, create a pile called "Leisure" rather than creating a file for every type of leisure activity you have.
6. Use post-it notes to label the top page of each pile until you create a permanent file location/category.
7. Count the number of "piles" you have which will be a good indicator of the number of hanging file folders you will need.. Purchase a minimum of the same number of interior file folders to insert inside the hanging file folders and supplies to easily add files to your system in the future.
8. Create a set of hanging file folders and associated interior file folder(s) for each pile, adding subcategories as necessary.
9. Create a general index/list of your categories and file names (handwritten or computerized). This will assist you in locating files and help prevent duplication of files/folders.

CREATING A INDEX BASED SYSTEM

1. Compile and sort your papers using the FAT™ process (**File-Act-Toss**).
2. Start with your **Act** papers and integrate them into your calendar, your tickle file and/or your action management system.
3. Next, separate the remaining papers into **Reference** and **Archive** piles (continue to look for papers that would be safe to “Toss”- the less you store, the easier you will be able to access the papers you truly need). Remember “Clutter is Postponed Decisions™”.
4. Create a 4 column Excel Spreadsheet or Word Table with the following headings:
 - File # - File Name – Location – Contents
 - In the first column identify each row numerically, 1,2, 3, etc
 - Begin with the first set of papers and enter a file name and location in row #1 followed by a description of the contents: For example:

File #	File Name	Location	Contents
1	Insurance	Office Filing Cabinet	AAA, Blue Cross
2	Medical	Office Filing Cabinet	Dr. Smith, Immunizations
3	Taxes-Archive	Garage Banker Boxes	2001 -2007 Returns

5. Create empty hanging folders (no interior folders necessary) and label the folders numerically.
6. Once you have entered the papers into your index, drop them into the corresponding numbered folder.
7. Create an alpha ordered index of your folders by clicking the table header and then printing the index, or, search the index on your computer using the CTRL+F command.

Note: Organization guru David Allen indicates “*The ultimate filing system files by number with a computerized cross-reference database that tags topics with specific files*” ***The Paper Tiger*** from The Hemphill Productivity Institute is designed for this purpose. For a free trial offer and tele-class or webinar contact tracy@simplicated.com 541-788-7001

CREATING A “A to Z” BASED SYSTEM

1. Compile and sort your papers using the FAT™ process (**File-Act-Toss**).
2. Start with your **Act** papers and integrate them into your calendar, your tickle file and/or your action management system.
3. Next, separate the remaining papers into **Reference** and **Archive** piles (continue to look for papers that would be safe to “Toss”- the less you store, the easier you will be able to access the papers you truly need). Remember “Clutter is Postponed Decisions™”.
4. Create two sets of hanging folders; a set for reference and a set for archive. Label the folders with tabs A-Z.
5. Drop your papers into their respective A-Z folders (Reference or Archive).
6. If your system becomes large and unruly, add interior sub-folders i.e., add a single interior folder labeled “gardening” which contains all garden related papers and place it in the “G” hanging file.

Note: Pendaflex, a leading manufacturer recommends that files should be no more than ¾" thick. If you need a file with a greater thickness, use the "box bottom" hanging folders.

www.simplicated.com tracy@simplicated.com