

MANAGING THE FILES

Fact: 80% of papers kept are never looked at again.



Then...

- Why do we keep so many?
- Why are file cabinets bulging?
- Why are there piles of paper on the floor, chair and desktop?

Fact: It is not the volume of paper itself that is the problem, but rather the decision-making process.

This booklet will teach you...

- How to put those file cabinets on a diet.
- How to restrict those calorie-laden papers.
- How to exercise those fatty files for a trim, efficient and effective filing system.

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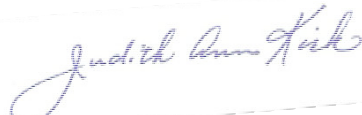
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Secrets from a Professional Organizer are simply common sense solutions to everyday problems. The majority of my clients have major issues with paper clutter both at home and at work. However, it is not the paper itself that is the problem, but the daily habits that create the clutter problems.

Getting organized is about changing behaviors and making wise choices. There is always a choice. All incoming papers require that you make a decision about which ones are important enough to keep in the valuable filing space and which ones get tossed.

Decide categories that represent your life, use colors, and think retrieval before you place papers in the cabinet. What will you be thinking about when you want this document back?

**You choose what action you will take—pile or file.
Happy Organizing!**



Judith Ann Kirk



Managing Files

Judith Ann Kirk

Organizing Resources

THE PAPERLESS OFFICE

Fact: 80% of papers kept are never looked at again

Have you ever wondered what happened to the paperless office? The fact is the technology that was to reduce dependency on paper has actually increased consumption.

Why are so many papers kept? Because it is not easy to distinguish the difference between important and trivial. It is much safer to keep everything, just in case!

It is not the volume of paper itself that is the problem, but rather the decision-making process. Focus your attention on those bulging file cabinets. It is time to put them on a diet. You will need to restrict those calorie-laden papers and exercise those fatty files in order to achieve a slimmer filing system.

Throughout the process, you will determine what really needs to be kept, purge the excess, and benefit from achieving easy access to the documents you need.

Statistics

- **More information has been produced within the last 30 years than in the last 5,000.**
- **A New York Times weekday edition contains more information than the average person was likely to come across in a lifetime in 17th-century England.**
- **Over 9,000 periodicals are published in the U.S. each year, and almost 1,000 books are published daily around the world**

Information Skills for an Information Society: A Review of Research, Susan Hubbard

*Help!
I am drowning
in paper
overload*



RECORDS MANAGEMENT

Records management is rarely a priority at home or in the office. It seems that there are more important things to do than deal with the influx of paper.

However, when piles of paper and bulging file cabinets take over your life, time is well spent on establishing a system for *retention*, *retrieval* and *disposal*.

As you think about setting up a workable file system, you must stay cognizant of three important points – what to keep, where to keep it, and for how long.

Most papers that come your way are fundamentally unimportant. You read, and then toss. Being able to discern the relevancy of information will help to eliminate pile up. The problem develops when you do not understand value and believe you should keep it all, just in case.

Then there is the category of documents that is useful beyond a single reading. These papers must be kept for a certain period of time or archived for an extended period of time. Where you keep these important papers depends on how frequently you need to access them.

Current documents are best kept in a file cabinet close to your desk or work area. Older documents can be archived into the attic, basement, garage or off-site. Remember to adequately label all boxes to accelerate retrieval.

Tax-related documents are keepers. Generally speaking, the IRS has three years to audit a return. To be on the safe side, consult your attorney, financial planner or accountant to determine what is pertinent for you to keep. Another source for tax information is <http://www.irs.gov>.

Definitions

- **Files**—A collection of papers or published materials arranged in a convenient order for easy retrieval
- **Retention**—to maintain possession; to keep for a certain period of time
- **Retrieval**—the process of accessing and recovering information
- **Disposal**—the act of getting rid of something



CASE STUDY—A COMPLETE SYSTEM

When Peter and I chatted on the phone, he told me he had a good filing system, one that he understood. But the reason for the call was that he had lost a pertinent insurance policy. “Misfiled,” he stated, “and I really need to find it.”

When I arrived for our appointment, Peter escorted me directly to his file cabinet. He also pointed out several boxes at the end of his desk because the cabinet was full. In fact, papers were everywhere—the floor, window sill, chairs and desktop.

The planning began with a discussion on different aspects of his files — personal, household, business and reference material.

We labeled four boxes, designated a color for each category and began the sorting process. It was time consuming, but Peter eventually found the insurance policy. However, the work continued.

Once all the files were sorted into the boxes, we determined where each category would be housed. Peter decided that business files needed to be in the cabinet close to his desk along with his personal files. The household files were placed in a rolling file bin and reference material would be filed in 3-ring black binders on the bookshelf.

Peter sat on the floor and visually scanned each file while I sat at the computer and prepared the labeling system (see the next page for examples of the layout for file labels).

The process was slow and tedious, for sure, but what resulted was a clear, concise, color-coded filing system.

The following is his cross-reference color coding:

Green — Business
Blue — Household
Orange — Personal
Black — Reference

Finally, we set up a Tickler File System in Peter’s desk drawer. Now he has a complete system that is easily accessible, quickly identifiable and effortlessly retrievable.

Another successful job! Your files can be as well organized as Peter’s if you take the time to establish priority locations and color code your categories.

Characteristics of an effective filing system

1. Clear and simple categories that reflect specific concerns
2. Easy access and quick retrieval
3. Expandable for incoming information
4. Periodic purging to weed out the old and unused papers

EXAMPLE FILING LABELS

General Category—Hanging File Folder

Automobile-Jeep

Subcategory—Manila Interior Folder

EZ Pass

Automobile-Jeep

Insurance

Automobile-Jeep

Repairs

Automobile-Jeep

General Category—Hanging File Folder

Utilities

Subcategory—Manila Interior Folder

Cable

Utilities

Electric

Utilities

Gas

Utilities

Telephone

Utilities

Water

Utilities



Is there hope?

Of course, but only when you stop piling and start processing.

Valuable Assets

Papers are generally kept, either filed or piled, because you perceive that they are valuable. However, they are only useful if you know where they are and can access the information.

Ask yourself, “Can this information be retrieved from some other source?”

If the answer is **yes**, then toss.

If the answer is **no**, then develop a filing system to find what you want when you want it.

The organizer’s secret of successful filing: think retrieval. What will you be thinking about when you are looking for this information?

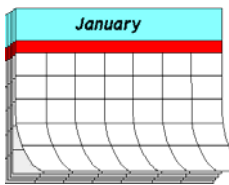
Make sure your classifications, categories and subcategories adequately explain what information each folder or binder contains.

Notice the labeling pattern: Each interior file folder lists the **subcategory** in bold lettering top left margin and the corresponding **category** in smaller lettering on the bottom right. Whenever a file folder is left on the desk or counter, all you have to do is refer to the label and you will know exactly where it belongs. Proper labeling makes it easy to file and easy to retrieve.

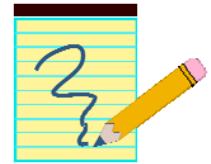
TICKLER SYSTEMS

A tickler file system acts as a reminder—something that tickles your memory. Originally, ticklers were special feathers used to tickle churchgoers who nodded off during the sermon. Today tickler files are used so that you can purposely forget information until it is needed.

■ Calendars are the simplest tickler system. They provide a place to record appointments and upcoming events. The organizer's secret for effective use of a calendar system is to have only one. It is nearly impossible to coordinate life's events if you are juggling a personal calendar and a separate professional calendar. Have a family control center to keep track of the happenings of all family members.



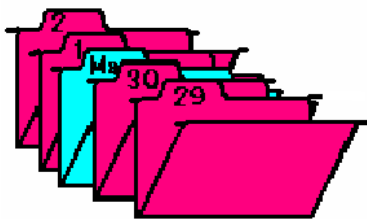
■ To-do lists are another form of a tickler system. Lots of people have "To-Do" lists. Lists are a fun activity. We feel that we have accomplished something when we get a chance to check off items on our list. Making a list brings out our creativity. We can think up all the should-haves, could-haves and would-haves, but, beware! "To-Do" lists tend to grow as time passes. Like a snowball rolling downhill, daily to-do lists pick up more and more jobs along the way. As we diligently sit down with a cup of coffee, paper and pen, we are filled with good intentions while constructing our lists. However, when commitment is missing, things do not get done. Then we realize we have more to do than we have time.



Lists are no substitute for planning. No one is effective without an adequate thinking process. Planning and scheduling translates intentions into action. It ensures results. If we stopped writing long lists of things to do, then we would have more time to do them.

■ A hanging file folder system is recommended to provide a temporary storage place for date-sensitive papers—information to be reviewed at a later date, bills to be paid, letters to be answered, decisions to make, tickets purchased for a specific event, cards to be sent, follow-up information and a variety of other items needed on a specific day.

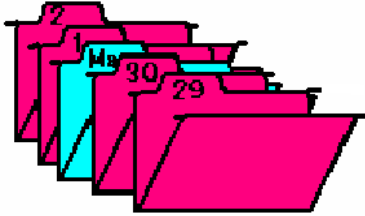
Tickler files are active, to be used daily on a rotating basis. If used effectively, this system will efficiently manage mail, information, documents for future appointments and time-related paperwork. If you cannot do everything in today's file, you can transfer the leftover tasks to another day, another week or another month.



No matter which system you choose for managing information, none will work unless you refer to it regularly. Calendars, to-do lists and tickler files can be combined and coordinated for effective time management.

MANAGING A TICKLER FILE

Tickler files are active and constantly rotating. That means that each day you will empty the front folder and move it to the back.



1. **Daily Folders 1-30/31:** As each day ends, the appropriate folder is emptied. That folder is moved behind the next month's folder and becomes the corresponding day of the next month.

2. **Monthly Folders January-December:** At the beginning of each month, papers are dispersed into the proper daily folders. Then that empty folder is moved to the very back and becomes the same month for the next year.

As you empty each **daily** folder, always place it behind the next **month's** folder.

(Refer to diagram above and you will notice that there is a **29** and a **30** in front of the **May** folder, and a **1** and a **2** after the folder. This diagram depicts the forward movement of the **May** folder as each day passes.

As the end of the month gets closer, start to disperse paperwork into the appropriate daily folder of the next month. On the first day of the month, the folder needs to be emptied and all papers placed into the correct day of action. Place the empty month's folder in the very back and it is now ready to receive information for next year.

Having two different colors — one for **daily** folders and a contrasting color for the **monthly** folders — you can easily see how the rotating system works.

Paperwork is distributed into the appropriate **day** or **month** that corresponds to the date you need the information or plan to work on a particular project. Each day you refer to the appropriate folder and remove the work for that day. Make it easy on yourself. You can only accomplish so much in the allotted time. Don't get caught up in thinking you can do more. Be realistic—you have only 24 hours in a day.

SPECIAL NOTICE

I made my own tickler file system using durable Pendaflex folders. A variety of colors is available to coordinate your personal file system.



[CLICK HERE](#) to view the variety of Pendaflex hanging file folders on Amazon. Choose your two-color combination that pleases your senses.

For the monthly and daily tab labels, [CLICK HERE](#).

PERSONAL INFORMATION FOR AN EMERGENCY

We have all heard horror stories where important documents, such as a will or life insurance policy were known to exist but never found.

Be thoughtful of your loved ones and get your personal information in order. Put this information in one easy to retrieve location. There is no better time than right now to set your affairs in order.

Include:

- Biographical and family history
- Medical information
- Marriage certificates
- Birth certificates
- Voter's registration
- Financial portfolios
- Employment records
- Property documents
- Automobile titles
- Legal paperwork
- Insurance policies
- Vital contact information
- Living will
- Power of Attorney



***“The secret of getting ahead
is getting started.***

***The secret of getting started
is breaking your complex
overwhelming tasks into
small manageable tasks,
and then
start on the first one.”***

–Mark Twain

QUICK FILING TIPS

Trips to the file cabinet consume precious moments especially when you cannot find what you are looking for. Here are a few timesaving tips gathered by Pendaflex.

- **Cost-effective** hanging file folders eliminate jammed papers, hidden tabs and slumping folders. Interior reinforced pocket strips on the back flap can be used to store computer disks, business cards, photos, and other small items that have a tendency of slipping out.
- **Identify** files three times faster by using color-coded files. Assigning different colors to specific groupings creates a visual block of colors for quick referencing.
- **Eliminate** delay time when accessing folders. Place the index tab on the front flap and simply pull the tab forward and the file opens easily.
- **Efficient** visibility is accomplished by placing the index tabs down one side of the file drawer. This eliminates eye movement from left to center to right and back to the left again. However, interior folders are easily accessible when using 1/3 cut folders allowing three visible areas for printed labels.
- **Effective** file folders are not overstuffed. Put no more than 1/2" – 3/4" of papers in each folder. Bulky records, manuals or reference books are easily stored in hanging reinforced box bottom file folders with closed or opened side guards.
- **Quick** access to filed contents can be accomplished by using the score lines on each flap. Creasing the hanging file folders along the score allows you to pull the folder up and prop it open on neighboring folders.
- **Divide and conquer** information with *interior* file folders. These specially designed folders have a slightly shorter tab than traditional file folders. Higher tabs block the index tabs on the hanging file folder and scrape across the top of file drawer. Colored *interior* folders are lighter on the inside to prevent misfiling between folders.
- **Accessibility** to individual file folders can be easily accomplished if you do not overload the drawer. Hanging folders are designed to slide on the rails. Leave 2-3" of sliding space to provide easy access.
- **Economical**, durable files are reinforced at critical wear points—top and bottom borders and along tab index strip.
- **Stress-less** retrieval is enhanced when you avoid the use of paper clips. They take up more space and usually catch on papers in the files. Stapling related papers together is a better option.
- **Immediately** see the latest action or information by filing the most recent papers in the front.

And, don't forget to label the outside of the file cabinet.



BRIGHT IDEA — 60-MINUTE PLAN

- How much time do you spend searching boxes, file cabinets, scraps of paper, desk drawers or messy hard drives?
- How often is the elusive document the source of your frustration, stress and high blood pressure?
- How many excuses do you generate because you cannot control the paper clutter?
- How often are you late for an appointment because you either forgot about it or couldn't find the appropriate papers?
- Do paper piles clutter your desk, chair and floor. Are they waiting for you to find time to file?
- Have you ever broken a nail or received a finger cut because the file cabinet was so stuffed not one more piece of paper would fit?
- Do you say, "One of these days I just have to get organized?"

Well, now is the time to stop making excuses and start being efficient. Now is the time to begin the process of deciding what is important and what is not.

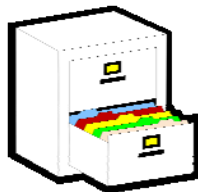
Ok, so you say, "Good idea, but where is that time?"

The organizer's secret is that you do not have to do it all in one afternoon or evening. You do not have to reserve a full Saturday just to clean up.

Organizers know that if you plan the details and schedule the time to implement that plan, then the chances are extremely high that you will follow through.

So, here is the plan:

1. Pull out your calendar.
2. Make an appointment with yourself for one hour (60 minutes) each week.



3. Pick the most likely time that will work for you and be consistent with the scheduling.
4. If you use an electronic calendar, set a recurrence alarm. If you use a paper system, then write down your appointment for each week using bright colored ink.
5. On the designated date and time, grab a kitchen timer, set it for one hour and start.
6. When purging the file cabinet, start at the front top drawer and pull out every folder and determine the importance of each document.
7. As you move from one file to the next, rename folders so they have a uniform style and correspond to the paperwork inside. (See page 6.) Trash those papers that no longer have relevance. Purging is the name of the game.
8. Remember that this is purging time. Set up a folder or box for those items you come across that need your attention. You can handle those things after the timer rings. Also keep the wastebasket / shredder handy for immediate use.
9. Stay focused for the one hour. Purge and enjoy your new found space.
10. When the buzzer rings, place a brightly colored folder where you ended. Next week, start there.

Knowing when to stop is as important as when to begin. Remember you have scheduled another hour next week. So, relax, you will get to every file eventually.

PERSONAL AUDIT

- Forgot an important appointment, birthday or anniversary?
- Spending precious time searching for misplaced items?
- Shuffle papers like a card dealer at the casino?
- Filing system chaotic or nonexistent?
- Desk resemble a war zone?
- To-do list long enough to keep legislature busy for several years?
- Juggling multiple projects and trying to do too much?
- Promise yourself that *someday* you will get organized, but right now you have too much to do?
- Do you use your valuable time in the best way possible to achieve success and balance in your life?

Maybe you need to contact me!

Judith Ann Kirk, Professional Organizer / Personal Coach

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THREE STEPS TO STRESS-LESS LIVING

1. Simplify

Purge the unused, broken, and unloved items

2. Organize

More than three of anything is a collection,
and collections come with strings attached

3. Lighten the Load

Need what you have and have what you need
Enough, but not too much
A place for everything

BALANCING ~ JUGGLING

Too many balls in the air... The all too familiar complaint is that there are too many balls in the air. In this time-strapped, chaotic world, life has become a juggling act, both at work and at home. There are too many things to do, too many places to go and too many demands with too little time. We are all jugglers.

“Anyone can learn to juggle,” says Michael Moschen, the world’s greatest juggler and resident of Cornwall Bridge, CT. “The odd thing about juggling is that it is frustrating when you can’t do it and then, when you finally can, you can’t understand why you couldn’t always do it.”

The key to juggling anything—from rubber balls to telephone calls—is to be attentive, systematic and organized. It is a simple process of breaking down complex patterns into manageable tasks. It is learning how to be focused and remain balanced. In the perfect juggling sequence, the balls move without any apparent effort.

Let’s take a few minutes to contemplate what goes into the cycle of juggling. To learn one must start exercising with one ball by throwing it in an arc from hand to hand staying focus on the path of the ball. Practice makes it easier. When you have mastered the ability to stay focused on the pathway of one ball you can attempt the process with two balls. Hold one ball in each hand and alternate tossing in an arc formation catching with the opposite hand. A common mistake is throwing both balls at the same time or losing concentration on the pathway. Juggling requires control of your body. Individuals with good balance can move about easily and still stay focused.

How does this work with juggling telephone calls, deadlines, to-do lists, appointments, relationship, health, personal care, career, fun-time and all aspects of life? Simple! Start with one ball at a time and stay focused to your own value system. Make a firm commitment to live with purpose. The objective is to be balanced—to maintain a steady position in alignment with core values. A huge mistake is trying to work with more balls than you can handle. Like juggling, balancing life demands is not a static state, but a fluid, ever-changing process. Balancing your true life purpose is less chaotic, less exhausting, and more sustainable over time.

Yearning for a simpler life with fewer balls in the air? Judith Ann Kirk at Organizing Resources will address your particular juggling concerns and provide you with tools and techniques to obtain and maintain a comfortable level of organization. Being organized will

- sharpen your vision,
- reduce the number of balls,
- increase productivity,
- improve your balance,
- decrease stress and more

Are you open to the possibilities?

Telephone & Email Coaching available—Call today!

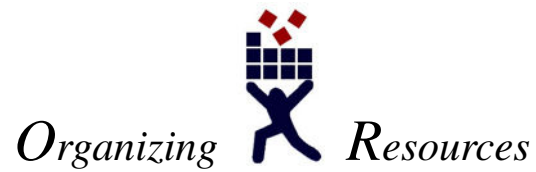
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