

Power Over Paperwork

*Your Guide to
Decluttering and
Organizing Papers*

Welcome & Introduction

Paperwork used to be my biggest nemesis in organization. No matter what I tried I just couldn't get a system to work. Some of it had to do with self-discipline and part of it had to do with my filing system.

Sometimes I felt like a paper mill had exploded in our home office.

I remember how frantic I felt that time when I couldn't find a very important piece of paper. Anywhere.

I tore apart folder after folder, emptied drawers, and it was still nowhere to be found.

I finally gave a defeated sigh and decided that this HAD to change. I wasn't going to go through this again!

I needed a simple system for filing and organizing paperwork in a quick, efficient way.

This is the method I've used to finally get my papers in order and I want to help you to do the same.

Let's get started...

Step 1: Assess

Start by asking yourself these questions:

Where is paper collecting?

What areas are causing stress?

Make a list of what's NOT working.

What needs to change?

Step 2: Prepare

Now it's time to gather some supplies to purge and organize. Here are some things I recommend:

Filing place ([Filing cabinet](#) or [box](#))

Recycle box

Shred box

[Shredder](#)

[File folders](#)

[Hanging file folders](#)

Pen or a [label maker](#)

Things I have:

Things to get:

Step 3: Create a Plan of Action

What do you need to sort through?

What are you going to keep?

What are you going to shred?

What are you going to recycle?

Handling Important Documents

Let's start with your important documents. Take all of your important documents and file them in a separate, safe place such as a safe deposit box or at least a fireproof box in your home. (See handout for what to include here)

It should also be pretty easy to access in case you need to use the documentation.

You could also choose to keep these items in a safe deposit box, which is also a good option. If you go that route, I'd recommend keeping copies of these at home in a [fireproof box](#).

Some of these documents should include:

1. Social Security cards
2. Birth Certificates
3. Marriage Certificate
4. Deeds
5. Appraisals
6. Power of Attorney
7. Diplomas
8. Death Certificate
9. Military discharge papers
10. Passports
11. Life insurance policy

And pretty much anything else you need to keep safe. Granted, most of the things listed can be reissued at the appropriate facility.. but who wants to mess with that? This way all important documents are all together in one safe place.

There are definitely some other steps to get your paperwork and filing in shape, but this is an important first step. Gathering your most important information and keeping it stored in a safe place can ensure easy access at the appropriate time and can also prevent a whole lot of headache.

Handbooks and Manuals

Next let's figure out what to do with your handbooks and manuals - there are a few different options.

Right now I have all of our manuals organized into a single file folder. This works for us, but I've seen some other great ideas such as putting the manuals in page protectors and storing them in a binder. You could also try to find copies online and just save them digitally.

Here are some ideas of manuals to keep on hand:

- Lawnmower
- Cell Phones
- Large & Small Appliances
- Weed eater & other yard tools
- Power tools
- Video Game Systems
- TV
- Computers
- Tablets

Even if the item is really simple to use and the manual is not necessarily needed, if it has the warranty information in it, I'd consider it worth keeping. Then when I do an annual "file audit" of my files, I go through my manual folder and recycle any manuals for items we no longer own.

How long should I keep files?

Here's a list of how long it is recommended you keep certain papers:

- Utility, Phone, Internet, etc. Bills: 1 or 2 months
- Medical/Dental/Insurance Bills: 1 or 2 years (The billing can take forever!)
- Tax Documents: At least 7 years
- Pay Stubs: 1 year until you get your W-2 and everything is correct
- Bank Statements: 7 years if you need them for tax purposes, otherwise 1 year is plenty. I get electronic statements and that certainly saves some paper clutter!

Things I've thrown out include some correspondence, papers from college, and old check stubs that I found. I've been able to condense most of our files into one drawer in our file cabinet!

Important Papers & Manuals

Important documents to keep:

How I'm handling handbooks
and manuals:

Notes:

Step 3: DeClutter + Organize

Now that we have some groundwork in place, it's time to declutter and organize your papers. I won't lie, this part is tedious and time consuming. But you will be SO glad when it's done. Take all of your paperwork and:

- Recycle or shred what you no longer need
- Make sure files are still relevant
- Determine what categories you need
- Make piles of papers in different categories to file
- Make new file folders + label them
- File them in an orderly system (like by category or alphabetically) in your file cabinet, container, drawer, or wherever you're going to store them. I do suggest that it's easily accessible so things actually get filed and not just sit in a pile somewhere.

A note on categories for your files:

There are many different ways to categorize your files - you just need a system that works for YOU. Here are some things to think about while creating your filing system:

- Do I want files for each person or keep everyone's files together in one folder? (i.e. medical bills)
- How many folders do I want to have?
- What makes the most sense for the files I have?

I've included a list of my folders as an example.

My DeCluttering Plan:



Step 4: Systemize

We're not done quite yet!

We need a SYSTEM to keep the paler under control.

Here are some thoughts to consider:

- Go through mail right away and recycle junk.
- Unsubscribe from junk mail. Set aside some time to call and get your name off some mailing lists.
- Move to paperless billing. And automatic online payments.
- The less paper coming in, the less overwhelming it is to organize!
Even getting rid of a little bit at a time will help a lot in the long run.

Sample system:

- Go through mail right away. Recycle junk.
- Put bills in your bill payment spot.
- Deal with anything important now.
- Put anything else in your weekly paperwork box.
- Schedule time every week to go through the box and deal with papers and file.

My Paperwork System:



Moving Forward

Great job! You've reached the end of *Power over Paperwork!*

You should now be well on your way to organized paper. Keep working your system for future success.

Moving forward, here are some recommended resources for further decluttering of your papers and home:

- [Conquer Your Clutter Super Bundle](#)
- [DeCluttering Printable Pack](#)
- [Unstuffed by Ruth Soukup](#)

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