



10

*Steps to
Take Your Office
from Piles to Files*

MAURA ZIMMERMAN
HOMESWEETHOMEORGANIZER.COM

Peaceful Office: Piles to Files

I know you're probably laughing and I understand.

If your home office or dining room/office combination is where you've been working this past year, you've likely been frustrated by the amount of paper that accumulates. Maybe you've tried to get a handle on the piles and you've even bought brand new file folders. You set aside the time and then you're staring at the stacks and piles and feelings of overwhelm engulf you.

No worries because this guide is about simplifying your office and transforming it into a more productive less stressful space. You're about to realize how simply . . .

your PILES can become FILES!

Maura Zimmerman,

The Home Sweet Home Organizer

P.S. If you'd like to learn more about working with me on your organizing projects, click below and schedule your Free 30-Minute Consultation.

Book Your Free Call Today!





10 Steps to Take Your Office From Piles to Files

1. GATHER ALL YOUR PAPERS FROM EVERYWHERE.
2. REDUCE INCOMING MAIL.
3. CURSORY SORT INTO SAVE, RECYCLE, SHRED.
4. SET UP 3 FOLDERS ON YOUR DESK: ACTION, READ, FILE.
5. SORT THE SAVE INTO COMMON FILE CATEGORIES.
6. REVIEW CURRENT FILES.
7. GATHER YOUR SUPPLIES.
8. PROCESS THE SHREDDING.
9. TAKE RECYCLING TO THE CURBSIDE/CENTER.
10. ENJOY YOUR FILES, SAY GOODBYE TO PILES.

1. Start by gathering all your loose papers from everywhere in the home. If you have existing files, we'll examine those in a later step.

2. Reduce incoming mail. Access or create online accounts for each vendor or bank or credit card company. Sign up for paperless statements and communications.

3. Cursory Sort – set up 3 piles with sticky notes: a) Save, b) Recycle, c) Shred. This is a quick sort, don't dawdle on any one document. If unsure, put it into the Save pile.

a. Save – all papers that require further action or must be saved, e.g., financial papers, medical documents.

b. Recycle – all junk mail and outer envelopes from opened mail.

c. Shred – all unnecessary paper with personal identification information and/or account numbers. An identity theft roller stamp is an alternative.



4. Set up 3 folders on your desk: a) Action Required, b) To Read, c) To File.

a. Action Required – A permission slip needing to be signed or a warranty to register the new laptop.

b. To Read – Notes from teachers or the latest issue of your favorite magazine.

c. To File – Important documents to be kept.

5. Categorize the Save pile into general groupings. Some common files you may have to keep are:*

a. Income Tax Returns

b. Mortgage, deeds, lease agreements

c. Records: birth, death, marriage, divorce, adoption, etc.

d. Retirement records

e. Will and Trust documents

f. Purchase receipts for high-dollar items. Think cars, laptops, refrigerators.

g. Medical bills and documentation



6. Review your current folders and recycle or shred as appropriate. Check to see if the old folders need to be replaced.

7. Gather your supplies, this assumes a file box or drawer(s) is available: hanging file folders, file folders, clear or colored tabs and inserts, black fine point Sharpie. Place the tabs either all on the left or all on the right of the hanging files. This will make it easier to maintain a tidy appearance and easy to find what you're looking for. Organize the hanging files from A to Z and front to back.

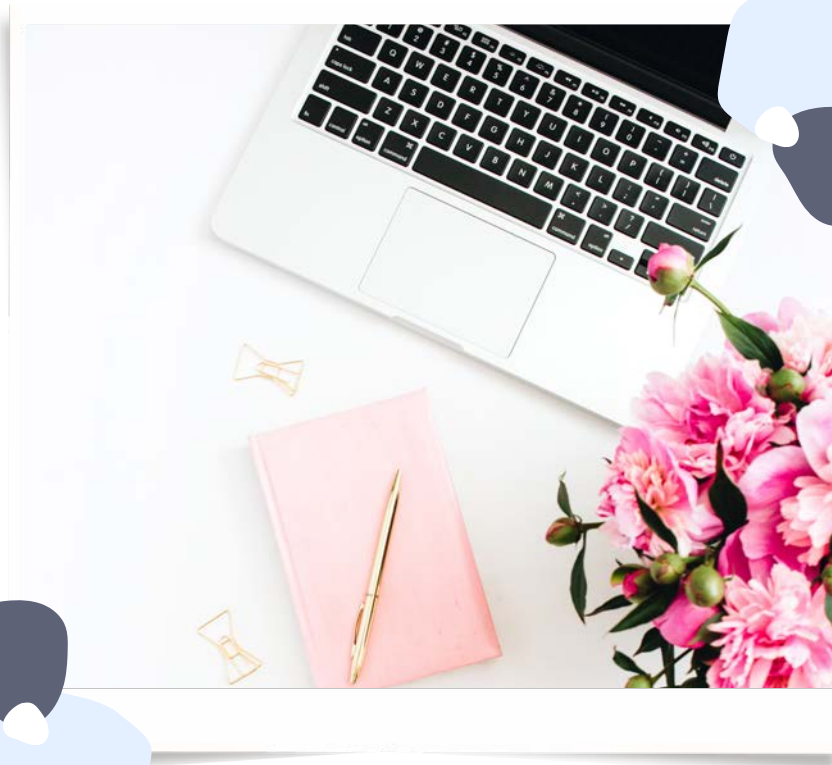
8. Process all of your shredding at home or you can take it to Office Depot for secure handling of your documents for about \$1 per pound.

9. Put all the recycling into your curbside bin or take it to your community recycling center.

10. Sit back and enjoy the peace of mind that comes with your documents being organized and easily retrievable.

*NOTE: You can find additional information regarding document retention at www.irs.gov.





Thank You!

I hope you found this guide helpful in organizing your files and losing the piles. If you'd like to learn more about how I can help you complete your office organization or any space, please schedule a Free Consultation below.

*Maura Zimmerman,
The Home Sweet Home Organizer*



[Click to Schedule a Free 30-Minute Consultation](#)