

Paper Management for the New Year



Despite the fact that in the future we will be storing more and more input digitally, on the computer and in the cloud, we still have to deal with paper! Most of us are “hybrids” - using paper documents and records, as well as storing things in a digital form.

January is a good time to deal with whatever papers you have, and to get your home "office space" cleared out and ready to take on the new year. De-cluttering and organizing your desk and papers will decrease your stress, make you more efficient and effective, and fostering balance and peace-of-mind.

Here are some tips about having a peaceful, functional paperwork area - one that's ready for this new year. *(Please don't feel overwhelmed by this long list. Even one change can make a difference! Really!)*

- **Block off some time on your calendar** to give your home office a tune-up.
- **Do a general de-cluttering.** Get rid of anything that belongs elsewhere, or that isn't beautiful or useful. Be ruthless. In the process, collect all papers and supplies that are lying around and sort them into categories.
- **Make sure your space has all the essentials including:** good lighting, a comfortable chair, an empty surface to work on, drawers and cabinets or the proper containers for files and supplies, and equipment that works well and is in good repair.
- **Have a filing system that makes sense to you** - with places for: 1) everything that is "hot" (i.e. needs "action," or that you are currently working on), 2) "reference" files and materials, and 3) "archives." Label everything, and make sure your files (and supplies) have "space to breathe."
- **Especially important this month: finish filing all financial papers (and/or entering data into electronic financial software),** and set things aside for tax preparation. Make sure your system for capturing the new year's receipts and other tax backup is up and running.

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- **Make the space aesthetically pleasing to you** - put up inspiring artwork, and keep only very special knickknacks and decorations. Less is more. You might want to get colorful and attractive office supplies, helping to make those tedious administrative tasks more inviting.
- **Other things to keep in mind:** keep your computer files backed up, have a bin or file for "things to enter into the computer," keep your bulletin board updated, and have a system for keeping track of your to-do's, contacts, and passwords.
- **Schedule time in your calendar for getting your paperwork done on a regular basis.**

As I said, any of the above activities can bring positive results. Give one a try!

"Greening" your office - While you're at it, consider one or more of the following ways to make your workspace more environmentally-friendly:



- Make sure to have both a **trash bin and a recycling bin** in your office area.
- **Avoid unnecessary printing** of email and other documents. Setting up good categories on your computer for saving documents & email will help with this.
- **Buy recycled paper** and office products. **Create a pile of printed material with blank reverse sides** and use as note paper or for printing.
- **Utilize energy-saving features on all electronics;** for example, set your computer to go into "sleep mode" after 5 or 10 minutes of idle time. **Use energy-saving lighting** - CFL's and LED's.
- **Recycle all office cartridges** and buy refurbished ones.
- **Allow electronic methods to replace paper.** Do banking and bill-paying on line. Use software, scanning, and e-mail instead of paper forms, letters, faxes, and newsletters.
- Learn about environmentally-friendly computer purchase, usage, and disposal. See the **new document** on the Advice page of my website entitled "**Green Options for Using and Recycling Computers.**"

For more "green" office ideas, see: "**Saving Paper - Saving Trees**" and "**Getting Off Marketing Lists**" on my website's Advice Page. Other helpful paper management articles there include: "**Shredding Advice**" and "**Records Retention: Papers to Save.**"