

## **FILING**

### **How To Do It Effectively**

Nobody enjoys filing, at least nobody I've ever met. But like it or not, keeping track of paper information is crucial to living an organized life or running a successful business. The biggest problem most people have with filing isn't how to store it, but how to retrieve it. So how do you create a filing system that works? Here are three basic steps to get you started.

1. Sort your material into BROAD TOPICS. (common categories are money, house, health, auto, hobbies/interests, family history/identification, insurance, etc.) Try to keep it to about ten broad categories. The plastic tabs on your hanging files should be at the FAR LEFT side on the FRONT flap of the folder, not the rear one. This makes the folder easier to open, you simply grab the tab that you want and pull it toward you to open it. The FAR LEFT tab position is a visual cue for you that this folder begins a broad category.

Also, as you are sorting, this is the perfect opportunity to PURGE your files of old, outdated, and irrelevant information that has been taking up space.

2. Then, sort each broad category into smaller subcategories. For example, MONEY might be subdivided into Banking, Retirement, and Investments while INSURANCE may contain the subcategories Car, Health, Homeowners and Life. For each hanging folder you have in this section, place your plastic tab in the CENTER position on the front of the folder. The center position is a visual cue for you that the folder is a SUBcategory of something larger.

3. Then further break down SUB-categories even smaller if you need to. For example, Banking might be broken down into Checking, Savings, and Money Market. Investments might be broken down into Stocks and 401K. See how that works? This level of information should be either in its own hanging folder with the plastic tab all the way to the RIGHT side, or you can also use manila folders inside the hanging folder called Banking, and just write the names of each account on the manila folder.

The thing to remember about creating a filing system is that it's crucial that the words you choose are relevant to you and the way you think. If you never use the word "finances" in your vocabulary, then don't write it on a file folder, choose something that is more your style, such as "money". If you aren't inclined to say "automobile" but rather, "car", then choose "car" for your file name. The reason that the language is so important is because filing is all about retrieval and not about storage. The question to ask yourself isn't "where should I keep this?" but rather, "how will I think of this so I can find it again?" Using the above tips to set up an intuitive filing system will make retrieval of information fast and easy.

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