

Reducing Stress by Organizing Your Paperwork

Objective

To develop a system for organizing your paperwork to reduce the stress in your life.

You Should Know

Do you find that your paperwork and mail keep piling up? Do you waste hours searching for important papers or overdue bills that you have misplaced? Disorganization creates unnecessary stress in your life, making you less productive and even affecting your self-esteem.

The key to staying on top of paperwork and mail is to create an easy and efficient system that works for you. Start by asking yourself the following questions:

The best method to sort and organize paperwork is one you can easily set up, maintain, and access. Here are a few strategies to help you get started:

- 1. Consider past/present/future.** PAST refers to papers you need to keep, but you do not have to access regularly. This might include tax-related documents or insurance policies. You can either scan and store them on your computer, or store physical copies in a file cabinet, box, or binder. PRESENT refers to items you need and use now, including current bills or medical information. You might place these in an easily-accessed desktop file or in a basket on your kitchen counter. FUTURE refers to papers you will eventually need but not right now. Again, store them where they are easily accessible. For example, you might use a binder with clear plastic sleeves to hold items you will need in the future.
- 2. Use wall space.** Hang magazine holders or wire files on the wall to organize mail and paperwork. Label or color-code hanging files. You might create a message center by using a magnetic, dry-erase, or cork board, to pin papers you need to access quickly and keep to-do lists in sight.
- 3. When in doubt, throw it out.** Sort all incoming mail and paper near the recycling bin or shredder. Get rid of what you do not need before it takes up space.
- 4. Go paperless as much as possible.** Pay your bills online, scan important receipts, and sign up for a mobile app to scan and store important documents. Create folders on your computer. Reducing the paper coming in will reduce overwhelm.

What to Do

1. **Identify a central location near a shredder or recycling bin where you will sort and review all paperwork and incoming mail.** Recycle junk mail immediately, and shred items with personal information that you do not need to retain (e.g., credit card offers). Goal: keep only the minimum amount of paper needed.

Central location: _____

2. **Decide on the receptacle you will use.** You might use a wicker basket, file tray, drawer, or box for this purpose. This might be near your computer, and if you do not pay bills electronically, you might need pens, stamps, checkbook, envelopes, calculator, and so forth, nearby.

What will you use? _____

3. **Set up some “rules” for keeping mail, bills, or paperwork.** For example, you might keep important paperwork for six months or scan items and discard the originals to reduce clutter. You can also take a picture with your phone and transfer the photo to a folder on your computer for important documents. Describe your rules:

4. **Identify three times per week when you will review the paperwork and mail and take required action (pay a bill, make a phone call, respond to a letter, and so forth).** Add this to your planner or task list. Choose days and times when you will have enough time to deal with everything. Avoid times when you are tired or stressed.

Write down days/times:

Once you have a system in place, practice sorting and organizing your mail and paperwork for the next two weeks. Use the following chart to track your progress. Choose three times/week to start. Include actions taken (shredding, sorting, filing, etc.), how the action(s) worked for you, and any notes (for example, what you can do differently).

Date	Actions taken	How did it work out?	Notes

Reflections on This Exercise

Was there anything that surprised you during this exercise?

What did you find most challenging about this exercise?

What did you find most helpful?

What else can you do to become more organized?

Are there ways to streamline how you deal with paperwork (for example, paying bills online, setting up automatic payments, or scanning important documents for online storage)?

How helpful was this exercise? _____
(1 = not very helpful, 5 = moderately helpful, 10 = extremely helpful)

What did you learn from this exercise?
