



## A.C.T. Paper Management System

All paper is either...		What are they?	Examples	Where to keep or dispose?	What makes it work?
<b>ACTION</b>  A prompt to get something done that is <i>important</i> and worth your <i>time</i> .  <b>Set aside time to take action on this paper</b>	<b>Tasks</b>	Simple or quick tasks – could be urgent or not urgent.	<ul style="list-style-type: none"> <li>Bills to pay</li> <li>Forms to fill out</li> <li>Greeting Cards to send</li> <li>Addresses to capture</li> <li>Receipts for items to return</li> <li>Awaiting response</li> </ul>	Best in contained inboxes, wallets, trays or desktop vertical files	Ask yourself: <b>What is the necessary action associated with this piece of paper?</b> If there is none, it's probably "reference" or "toss."
	<b>Projects</b>	A collection of paper requiring more than one task	<ul style="list-style-type: none"> <li>Events you are planning</li> <li>Remodeling Ideas</li> <li>Work related project</li> <li>Current year's income tax file</li> </ul>	If you're a "piler" best in vertical file holder or wall mounted filer holder or desktop file holder. If you're a "hider" best using a combination of hanging and manila folders in a drawer or in digital folder or bins if needed	Set aside time or a reminder to take action then dispose or file the paper when action is done.
<b>CONTAIN</b>  No action is needed but is retained because it will be referred to again or is worth keeping  <b>Minimize these documents.</b>	<b>Desktop Reference</b> "Need Now"	Papers and documents you need to refer to easily and quickly and generally don't change over time.	<ul style="list-style-type: none"> <li>Frequently called numbers</li> <li>Schedules</li> <li>Menus</li> <li>To-do lists</li> <li>Quick reference</li> </ul>	On your desk or within easy reach.	Update at least once a month and purge older versions of the same document.
	<b>Active Files</b> "Need Sooner Or Later"	Recent (less than 3 years old) documents you need or want to save for later but require no action	<ul style="list-style-type: none"> <li>Insurance records</li> <li>Home maintenance and warranty info</li> <li>Medical Records</li> <li>Paid bills</li> <li>Investment records</li> <li>Hobby or gift ideas</li> </ul>	File cabinet or file cart.	If it's not worth your time to file it, it's not worth your time to keep it. and ask yourself, "Where else could I find this information if I needed it?"
	<b>Archived Files</b> "Need to Keep"	Items you are obligated to keep for legal or financial reasons or records/documents that can not be easily replaced	<ul style="list-style-type: none"> <li>Older tax records</li> <li>Real estate documents</li> <li>Loan documents</li> <li>Sentiments, special greeting cards and memorabilia</li> <li>Personal writings</li> </ul>	Stored away for safekeeping. Need not be in your office.	Learn what to keep and what to toss from a professional organizer, tax advisor or by contacting <a href="http://www.letsmakeroom.com">LET'S MAKE ROOM</a> for a free written TIP.
<b>Toss</b>  <b>Maximize this paper for the biggest impact on your paper piles.</b>	<b>Recycle/Trash</b>	Paper that can be recycled, otherwise it is trash.	<ul style="list-style-type: none"> <li>Junk mail</li> <li>Old catalogs and magazines that hold no interest for you</li> <li>Business mail outer envelopes and inserts</li> <li>Personal receipts more than 30 days old</li> </ul>	Two bins one each for: <ul style="list-style-type: none"> <li>Recycling</li> <li>Trash</li> </ul>	Keep them near where you do your work and use them. Once on top of paper, use real bins or receptacles not cardboard or bags as these contribute to "clutter."
	<b>Shred</b>	Anything that has your unique identifier such as account numbers, medical record or tax identification number (SSN).	<ul style="list-style-type: none"> <li>Credit cards offers</li> <li>Password info</li> <li>Old financial records</li> <li>Bank statements</li> <li>Old medical records</li> </ul>	Personal shredder or document destruction service.	If you have at least a half banker's box full of paper to shred bring it to a local document destruction service in your area.