

QuickSort Setup and Tips

Purpose:

To quickly triage the daily influx of papers into neat and manageable "piles" awaiting the next step.

Benefits:

- Prevents paper clutter
- Enables you to find things more quickly/easily
- Breaks the paper-taming task into smaller chunks that require shorter pockets of time/attention
- Allows other household members to find papers and/or assist with the next steps

Materials Needed:

- Approximately 5-12 manila folders
- File labels
- File box with hanging folders or upright file holder

Categories:

Create a folder for each of the categories listed below that apply to you. Categories with an asterisk are strongly recommended for everyone.

Name	What Goes In Here	Next Step
Action*	Action items such as forms to complete, items requiring a response, research, or follow-up. (Bills go in "Pay")	Follow up/respond as needed, ideally within the next week.
Contacts	Phone #s/addresses/emails/business cards	Add to address book, if desired or keep here til needed
Coupons/Deals	New catalogs/circulars, purchase vouchers, coupons <i>you plan to use</i>	Transfer to wallet as needed; discard once expired
File*	Items requiring no action but needed for long-term (one year or longer) reference	File in separate long-term reference filing system
For [Insert Name]	Items requiring attention/action from another household member	Train them to check this folder and follow through on these items regularly
Keepsakes	Photos or memorabilia items you wish to add to your existing keepsake collection	Move to appropriate long-term photo/memorabilia storage
Pay*	Bills and invoices requiring payment	Pay as soon as possible
Read	Correspondence, newsletters, periodicals you wish to peruse later	Read and then discard
Receipts	Receipts needed for returns, reimbursement or expense tracking. (If for tax purposes, store in "Taxes")	Submit for reimbursement, use for return, or enter into expense tracking system, then file/scan in long-term

		reference as appropriate or discard
Scan	Items waiting to be scanned	Scan then discard
Shred*	Items requiring shredding	Shred and discard
Short-term Reference*	Items requiring no further action but needed for short-term (less than one year) reference. Examples are school lunch menu, field trip itinerary, soccer practice schedule, etc.	Clear folder every month or so and discard old items no longer needed
Taxes*	<i>Current</i> tax year documents ONLY that are required for filing returns next April	Once taxes are filed, archive these items with a copy of that return.

Tips for Using:

- Sort all incoming papers into the appropriate folders daily before you go to bed.
- Discard junk mail and outer envelopes (unless needed) as you sort.
- Visit Action and Pay folders at least once/week (set reminder alert in your phone until this becomes habit) to ensure nothing falls through the cracks.
- If helpful, write the specific action required on a sticky note and affix to each action item so that you'll remember what you need to do with it.
- Empty each folder and complete all required next steps at regular intervals or as soon as it begins getting too full. Overstuffed folders will cause this whole system to break down.
- If you have a big backlog of papers already built up, add a handful from that pile to each day's incoming papers until the backlog is gone.
- If you do not currently have a long-term reference filing system, set one up as soon as possible to prevent your "File" folder from overflowing. (See Commonly-Used Reference File Categories to help you get started.)
- Save only documents you really need to save. (See How Long Should I Keep It for guidance.)