



ORGANIZATION SOLUTIONS

Policies and Procedures Office Organization

The office has two major and distinct areas to organize – OFFICE SUPPLIES & PAPER / FILING

Office Supplies

Tape
Staples & Stapler
Paper & Binder Clips
Rubber Bands
Pens, Pencils, Sharpies
Paper
Scissors
Printer Ink
Note Pads
Post-It Notes
Stationery
Stamps
Envelopes
Mailing Supplies

Office Supplies - Placement

Office supplies are typically stored in two locations. A working supply of office supplies should be placed in the desk or workstation of the office, and the overflow or back stock supplies should be placed in a secondary location.

When determining what is considered a “working supply” – think about what the client will be using daily, and how much of each item will be a sufficient supply for at least 30 days.

If there is more than one workstation or desk in the office – you will put a working supply of office supplies in each of the work areas of the office.

Organizing the Working Supply

Drawer organizers are the best solution for organizing the supplies you are placing in the desk drawers.

The type of insert that you use will not only depend on the size of the drawer and the amount of supplies, but also the type of desk.

Choose a drawer organizer that best suits the space and the type of office you are organizing.

P.O. BOX 130571 HOUSTON, TX 77219 • 713.523.2134 • WWW.SQUARED AWAY.COM



Overflow / Back Stock

The overflow / back stock office supplies need to be sub-categorized and contained.

Use the size of box most appropriate for the amount of stock you have. We would prefer for you to use smaller boxes and keep your categories clean than to merge categories and use bigger boxes.

Where the back stock items are being stored will dictate what type what type of container you will use.

If they will be placed behind closed doors – you have more options. If they will be placed on open shelves and visible – you want to find a container that matches the décor of the office.

Due to the variety of sizes of office supplies – choosing a container that comes in a variety of sizes is best.

Because you will have multiple bins – you want a bin that has a lid so that you can stack them.

Labels

Pre-made office labels should be taken to all office organizing appointments so that you can label the majority of bins while you are there, reducing or eliminating the need to return to a client's house for labeling.

Should you not have all of the labels that you need – be sure YOU create all missing labels and figure out the best way to get them to the client.

Printer Paper and Ink Cartridges

If possible – it is best to store the printer paper and ink cartridges near the printer.

If the ink cartridges are individually wrapped and boxed – remove them from the box to save space.

If there is too much of either – keep a working supply near the printer with the excess with the other back stock office supplies.

Stationery

- Personalized Stationery
- Generic Stationery
- Greeting Cards
- Thank You Notes
- Kid's Stationery
- Loose Stationery
- Boxed Stationery
- Custom Embosser

There are multiple types of stationery, and the amount of inventory that the client has will determine if it should be sub-categorized, and where it should be stored.

If there is loose stationery – it should be contained and labeled accordingly.

If the stationery is boxed – the rule of thumb is to KEEP IT BOXED. *Especially if it is nice!*

If the client has stationery with pre-printed return addresses, and the address is no longer accurate – ask if these envelopes can be tossed.

Greeting Cards

If the client has a decent supply of greeting cards you will want to sort the cards by “event” or “holiday” and use a greeting card box to store the cards.

Our preferred greeting card organizer is the white Bigso greeting card box from the Container Store.

Label the tabs with the label maker and put in alphabetical order.

Mailing Supplies

Envelopes and stamps will be found in almost every office you will organize. These items are used often and a working supply needs to be placed near the workstation.

You will occasionally have a client who has as an assortment of additional mailing supplies, and you will need to keep these items together and treat them as their own category.

Listed below are examples of the types of items you would categorize as mailing supplies:

- Large Manila Envelopes
- Post Office Forms
- Fed-Ex Supplies
- Large Address Labels
- Packing Tape

Cables and Cords

It is likely that you will find that cords have become separated from their mates – leaving you with a random collection of cables and cords that cannot be identified easily.

It is unlikely that you will be quick to identify these cables, and it’s pertinent that you NOT invest the time trying to do so.

If, however, you can easily identify cords that you know belong to computer equipment vs. camera equipment, you definitely want to pull the computer cords out and store those in the office, not with the camera cords.

If the client believes that they can properly identify the cables, this would be a great homework project for them.

The best way to address the unidentified cords, outside of identifying them, is to put them in an appropriately sized bin and simply label them...

“Misc. Cables & Cords” or
“Camera & Video Cables & Cords.”

Computer Software and Manuals

Computer software and manuals are typically placed in a storage box and labeled.

BUT there will be occasions when the homeowner has actually invested time putting their software in CD binders. Don’t change their system - if they have one.

Computer Software and Manuals - Continued

If you find that their CD binder does not accommodate all of the software they have, we will need to buy additional binders so that all are stored the same or have the homeowner discard obsolete software to make room for the current software.

If you have large manuals and books that don't fit in the box you created, these can be stored nicely on the shelf next to the box of smaller manuals and software.

BEFORE DISCARDING ANY SOFTWARE BOX, BE CERTAIN THAT THERE ARE NO KEY CODES OR VITAL INFORMATION LOCATED ON THE BOX THAT THE CLIENT NEEDS FOR OWNERSHIP VERIFICATION.

Cameras & Video Equipment

Cameras and video equipment can often be found in the office area.

Refer to your training documents on Misc. Items / Odds & Ends to find the information regarding organizing Camera and Video equipment.

Creation of Filing System

It is important to know that organizing a client's files should ONLY be done when that is what we have been specifically hired to do.

If you are working on a move or helping a client move back into their office after a remodeling project – it is imperative to know that re-working or reorganizing the client's files is NOT to be done.

Even if the client is requesting our help with their files – doing so during the move is not the best time, and could cause serious delays to the progress of the move. It is best to schedule additional appointments for the organization of the client's file.

When unpacking files in either of these situations – PAY ATTENTION and BE PATIENT. Before taking any files out of the boxes – wait until you have identified all boxes that contain files. While the files are still in the boxes – see if you can identify any type of order that these files may be in. Don't hesitate to ask the homeowner to help you identify the order that the files should be removed and placed in the new file drawers.

Files / Paperwork

Dealing with someone's paperwork and files is a very sensitive and personal area to organize, and should not be taken lightly or done in haste.

The most important thing to remember when working with a client's files and paperwork is that YOU should never be the person deciding what should be thrown away or shredded.

There are questions the client can ask himself or herself to help them determine what should be kept and what can be tossed.

1. Do they need it?
2. Can they get this information again easily, efficiently and inexpensively?
3. Does the document have any tax implications?
4. Will they remember they have it?
5. Can they get the document digitally, and store digitally?

Getting Started

Getting started on the actual mounds of paper to create a filing system can seem daunting at first.

To help make this process more efficient, and more accurate, we have outlined the steps to take when starting the file building process.

Categorizing Files

Listed below are the MAJOR categories of documents typically filed. You do NOT want to create an abundance of MAJOR categories – 10-12 is the most you should need. The vast majority of papers you have will fall within one of the major categories listed below.

Major Categories (Plastic Tabs)

- Home
- Medical
- Insurance
- Personal
- Investments / Financial / Banking
- Legal Documents
- Automobiles
- Tax Records
- Kids / School
- Real Estate

Getting Started – Initial Sort

Getting started on the actual mounds of paper to create a filing system can seem daunting at first. To help make this process more efficient, and more accurate, we have outlined the steps to take when starting the file building process.

To get started you want to start with what we call the “Initial Sort.”

The Initial Sort is just that, our first stab at identifying what the paper / document is and what MAJOR category you think it belongs to.

To get started - create 10-14 areas for each of the MAJOR categories we talked about earlier. Label these areas for easy identification.

As you go through the papers, drop them into the category that you think they best belong.

Don't think too much in this stage. Drop the document into the major category and you can look at it more closely when you are dealing with each of the categories.

Secondary Sort

After you have sorted all papers into their MAJOR category it is time to work with a category at a time to start the Secondary Sort.

Working within each category – you are starting the SECONDARY SORT – which is identifying the SUB-CATEGORIES that the papers should be divided into.

Major Categories (Plastic Tab)	Sub-Categories (File Folders)
Home	Alarm Permit, Home Repair Receipts, Pest Control Contract
Medical	Medical –John, Medical-Joan, Explanation of Benefits
Insurance	Auto, Homeowner's, Life, Flood
Personal	Jewelry Receipts & Appraisals, Vital Records
Investments / Financial / Banking	WF Statements, SSB Statements
Legal Documents	Medical Power of Atty, Last Will & Testament, Divorce Decree
Automobiles	Volvo Financial Records, Volvo Maintenance Records, EZ-Tag
Tax Records	Taxes 2012, Taxes 2013, Property Taxes
Kids / School	Westbury High General Info, Report Cards – Susie
Real Estate	1200 Main St. Real Estate Docs., Beach House Real Estate Docs.

Customer Input

While the major categories and sub-categories provided are a great start – ALWAYS remember that a successful filing system is one that makes sense to the person using the system.

Work with the client when creating the system and get input from them. Ask them how they think of things and what label or name would be best to help them remember where something is filed.

Example – If you have a client with small school aged children and they are constantly accessing the child's immunization records for school requirements – it might be best to file this document with the child's school records instead of with the child's medical records. And – I would suggest making a copy of the document

and keeping it in both places, OR filing it digitally.

Creating the System – What You Need

- File Tabs – 1/3 Cut
- Manila Folders – ½ Cut Tab
- Grey Pendaflex Folders (Legal or Letter)
- Label Maker
- Label Tape
- Reading Glasses??
- File Drawer / File Box
- Inbox

File Tabs – 1/3 Cut

- 1/3 Cut Tab – Larger than Average Tab (NOT what come with the Pendaflex folders)
- Tab – Left Adjusted on Pendaflex File
- Tab - Front of the Pendaflex File (Manila Folders Come behind)
- Major Categories (Insurance, Auto, Medical...)
- Alphabetized by Major Category
- Make Label w/ Label Maker (Cap 1st Letter of Word Only)
- Make More than One Label at a Time!!!
- Left Adjust Label Tape on White Insert

Hint – The home category will more than likely house the files accessed most often. We will typically make this tab to read the home address. Ex 1234 Main Street. This let's you put the category at the front of the file drawer still maintaining the alphabetical system.

Pendaflex Folders

- Grey
- Need to be ordered online, in advance
- Preference is to have ONE file folder PER Pendaflex
- Legal or Letter?

Manila File Folders

The manila folders will hold all of the documents you are saving. You will sort all of these documents into subcategories and give each sub-category it's own folder.

- ½ Cut Tabs – Larger Tab for Larger Label
- Holds the documents the client wants to save
- Contents should be in chronological order
- Each folder represents a separate sub-category within the major category.
- The TAB on the file folder will always be right adjusted.
- The label on the tab is left adjusted
- Label – Capitalize only the first letter of each word
- Make Labels with Label Maker (Clear tape) AND MAKE MORE THAN ONE LABEL AT A TIME
- Don't Over-Stuff – Either expand the file OR use multiple file folders

Filed Documents

The papers you file within the manila folders should be removed from any envelope and should be unfolded. Documents that are folded will take up more space and will unnecessarily eat up space.

The papers should be flattened as best if possible if they are crinkled, and made to be as neat as possible.

Any document that has more than one page should be stapled together.

You want to, time permitting, place all documents in the file in chronological order.

Exceptions...

There are a handful of items that should NOT be removed from envelopes. Examples of those are below. If you are in doubt about a document or an item within an envelope – ask before removing.

Social Security Cards

Keys

Personal Letters

Transcripts

Primary, Secondary and Tertiary File Locations

The file drawer(s) located closest to the office workstation should house the files accessed most often. You will want to get the client to tell you which files those are. Obvious categories that will go in this area are: Home, Medical, and Financial.

Files that are not accessed that often should be housed in a secondary file drawer. And files that are rarely, if ever, accessed (old taxes) can be housed in a tertiary location.

If there aren't that many file locations in the office, you can move the tertiary files to a plastic file box and store them on a top shelf in the closet or in the attic.

Your objective is to avoid having the primary file drawer crammed with files. This will make accessing the files difficult and frustrating for the homeowner.

If the client doesn't have that many files, and all files fit nicely into the primary file space, you can leave all files in this area.

Organization of Files within the File Drawer or File Box

Files should be placed in the file drawer or file box with the major categories in alphabetical order. The file folders (sub-categories) within each of the major categories will be placed in alphabetical order within this section.

If the client has several home-related files that they access regularly – you can label that Major Category with the home address (ex 123 Main Street) – allowing this file category to be placed first in the drawer.

Binders

There are some clients that like to put certain information or file certain documents in a binder.

Typically you will have one binder per topic. Example: Recipe Binder, School Binder, and / or Banking Binder. You wouldn't want to find all three of those categories in the same binder.

Pick a binder size that is appropriate for the amount of information you will ultimately have. Keep the sub-categories that they will be accessing most often to the front of the binder.

We prefer to use white or black binders in an effort to keep things looking "clean. And we like white or clear tab dividers for the same reason.

The best way to store things in a binder is in sleeve protectors because the pages can tear out so easily without them. But not all clients will want to go to that trouble or expense. The rule of thumb would be to use them if the information will be in there a long time -like the recipe binder or the home decorating binder. But not use sleeve protectors if the information is not permanent - like the school binder for the current year.

IF you are keeping the documents in the binder in sleeve protectors – you **MUST USE EXTRA WIDE** divider tabs. The extra-wide tabs will extend beyond the documents so that they can be seen. If you don't use the extra wide divider tabs – the tabs do not extend past the documents and you will not see them without thumbing through the documents.

Shredding

Under no circumstances is anyone to remove personal documents from a client's home for the purpose of shredding! This is not negotiable. There are many things that can happen innocently enough that would compromise the client's information (car broken into, document blows out of the car in the wind), and put us in a very uncomfortable situation.

If the client has more shredding than is reasonable for a home shredder, we can make arrangements to have a shredding company come to their home, or we can find a shredding location in their neighborhood so that they can take the shredding themselves.

Shredding is cheap! SO – don't spend any time determining what needs to be shredded and what doesn't – shred it all.

If a client is looking to buy a personal shredder – it is suggested that they buy a crosscut shredder to maximize security. Research suggests that the most reliable shredders should cost the homeowner around \$60-\$80.

Maintenance

In order for the filing system to continue to function year after year – maintenance is key, especially for the primary files that are being used on a regular bases.

At the end of each year – it is suggested that the client go through their primary file drawer and toss any documents that are no longer needed, add any additional files they need, and move any documents to secondary or tertiary areas that are needed, but no longer need to be accessed regularly.

Example – If the client keeps all of their investment statements – these documents should be pulled out at the end of each year and moved to a secondary location to make room for the New Year's statements.

Misc. Guidelines / Information on Filing

- Medical, Auto, Home Insurance Documents – Only keep the current policy (Life Insurance is not mentioned because these policies are typically issued the first year of coverage and then only payment records are issued)
- Utilities (Electric, Gas, Water, Phone) – Make one folder for all utilities and only keep the contract and one statement from each company so that the client will have a record of the account number and phone number for each company.

Clients can easily obtain monthly statements from any utility company – so keeping all monthly statements is not necessary.

- Medical Records and Medical Bills – Medical records are different than medical bills. Many clients reconcile their medical bills with their insurance reports (Explanation of Benefits or EOBs) and these documents should be kept together for easy reconciliation.

Medical records are documents that contain important information about the client's health – reports showing results of blood work, lab results from a medical procedure.