

CLEAN MAMA'S

GUIDE TO GOING PAPER-LESS

**LESS PAPER WITH WELL-DESIGNED
SYSTEMS IN PLACE**



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Getting Started

✧ PART ONE ✧

Cut out as much paper as possible and be ruthless about excess paper in the house BUT have a well thought out plan for paper in place.

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Paper-Less Quick Start

Start thinking through how you deal with paper and any systems you have in place.

Here are some ideas to help you get started...



OPEN MAIL when you receive it and open it over the recycling bin.



PROCESS opened mail immediately – use 2 baskets to process things to deal with now // things to deal with later.



SHRED PAPER that doesn't need to be saved weekly or monthly.



SCAN anything that can be saved digitally.



SWITCH TO ELECTRONIC bank statements and bills.



OPT OUT of junk mail.



KIDS ARTWORK... save the best or things that have special meaning – I save everything with their darling little hand-prints.



PHOTOS... save digitally on a photo storage site and print books yearly.



MANUALS... keep in flexible file folder for easy access or access online.

A Plan for Paper

Making a plan for paper is the first step to getting on top of your paper piles.

Use this guide to break down those piles once and for all.



HELPFUL TIP

Print the following pages to mark baskets or bags and toss things in as you're sorting.

DAILY PAPER

Take time each day to separate items into mail, work and school papers. Recycle, file, shred or mark as in-process.

WEEKLY PAPER

Choose a day of the week to do a quick sort and weekly check-in. This is helpful to make sure you're dealing with the paper at least once a week if you miss a day or two.

WHAT DAY OF THE WEEK WILL YOU PROCESS YOUR PAPER PILES?

MON	TUE	WED	THU	FRI	SAT	SUN
-----	-----	-----	-----	-----	-----	-----

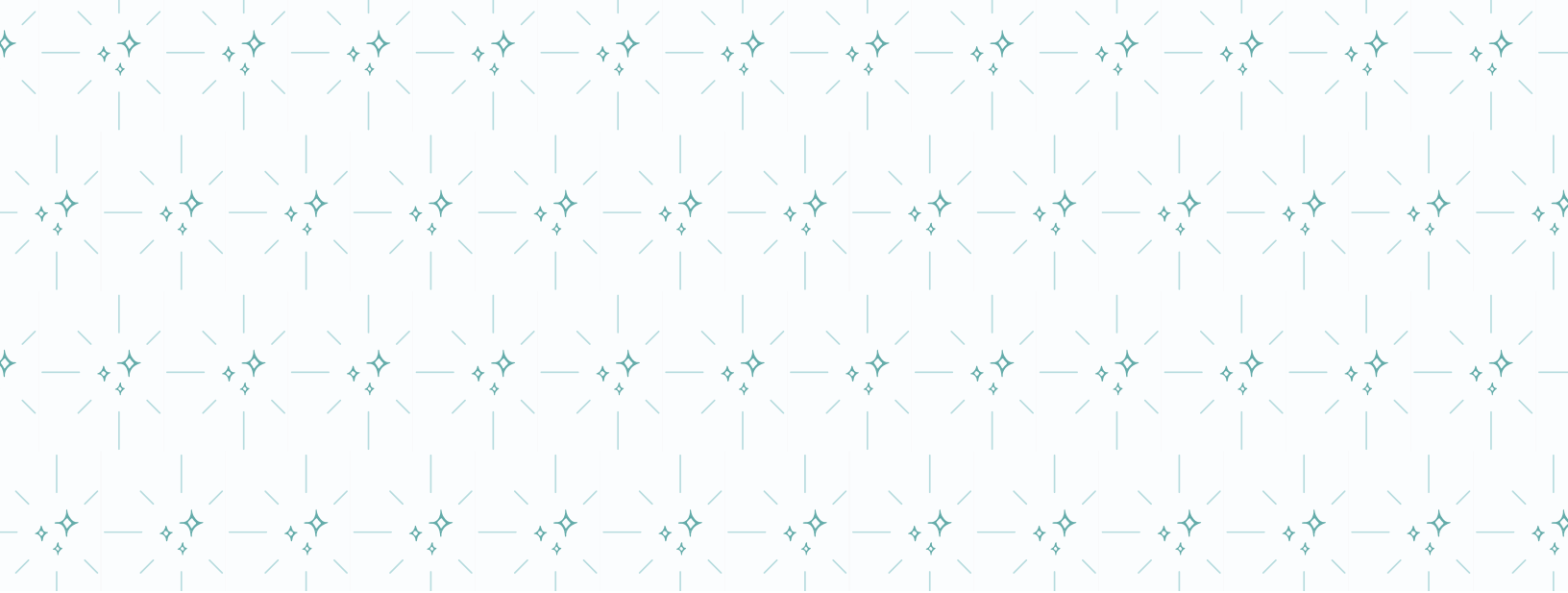
MONTHLY PAPER

Take some time at the end of the month or beginning of the month to file end of the month papers and bills. It's also a great time to zero out in/out boxes.

ANNUAL PAPER

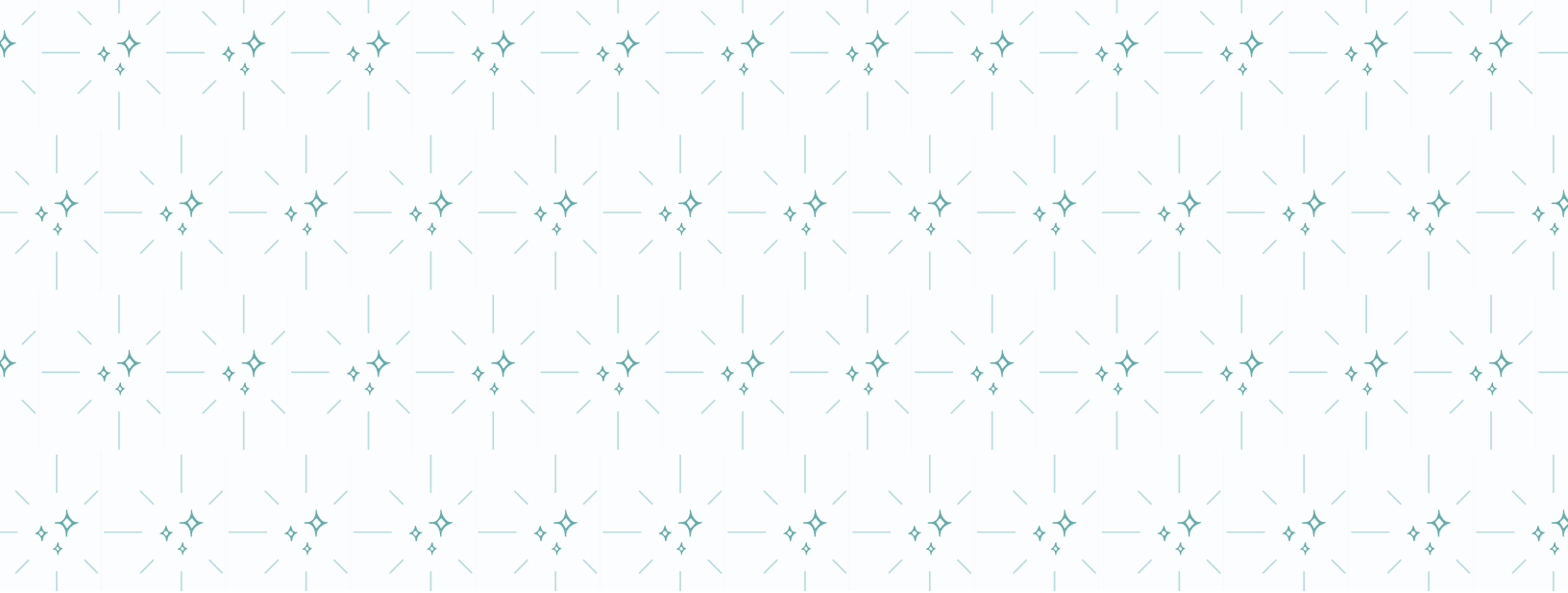
The key to keeping those paper piles away is having a plan for daily paper and subsequently those looming paper piles. Make this the year to put a plan in place and get ready for the next year as you're filing away the last.

WHAT PROCESS WILL BEST SUIT YOU?
WRITE IT DOWN HERE:



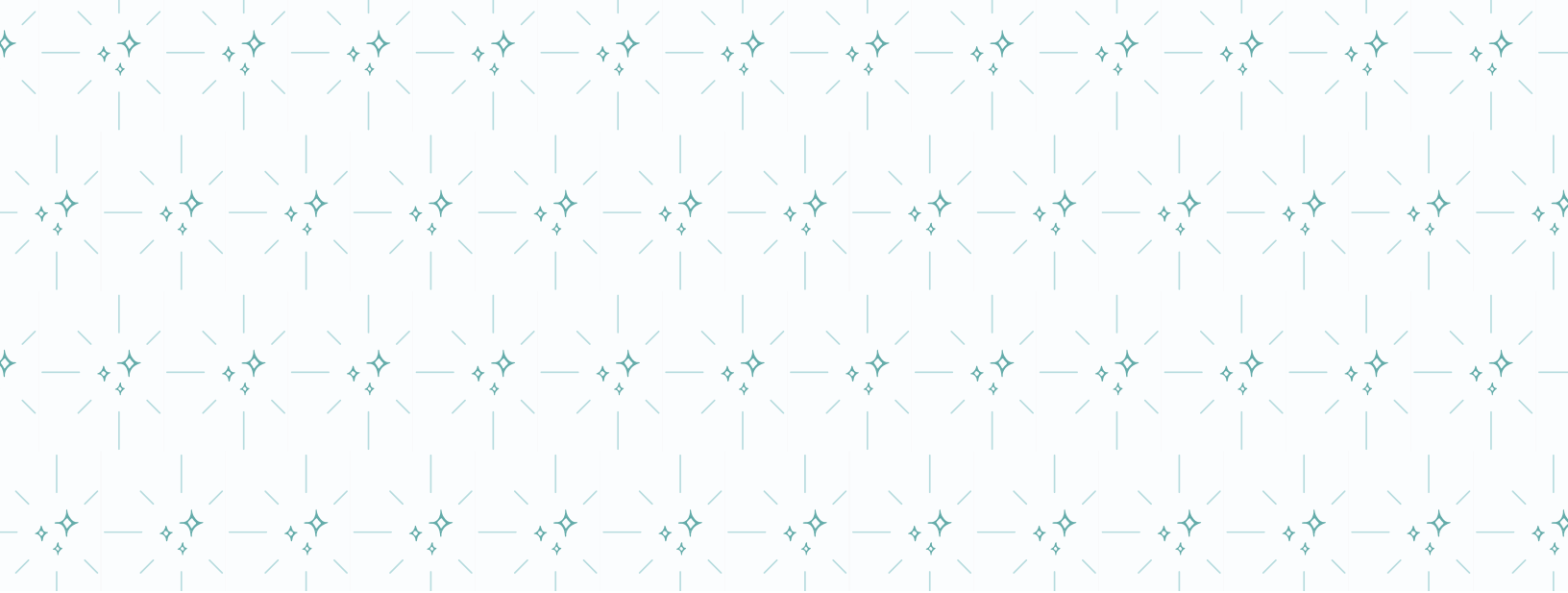
Toss

RECYCLE OR
TRASH



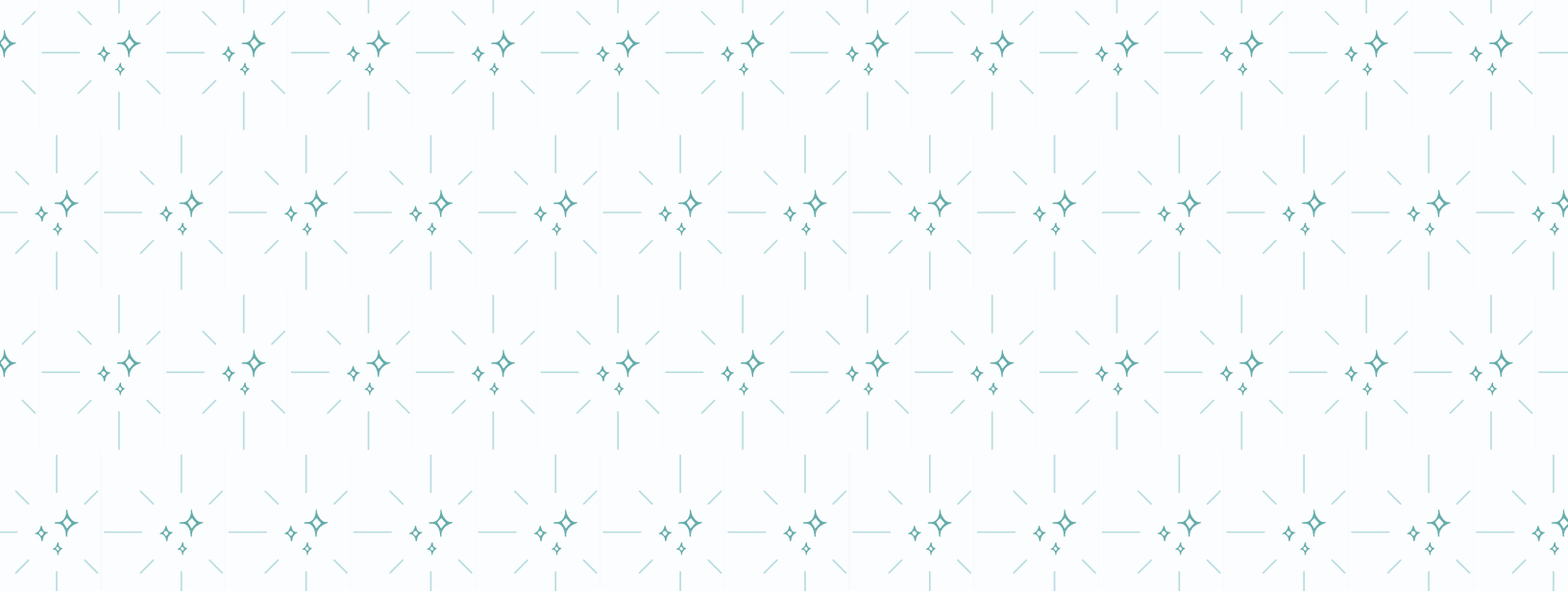
File

PUT THIS IN A PLACE
FOR SAFEKEEPING



Shred

DON'T NEED THIS &
NO ONE ELSE DOES



In Process

CURRENTLY
WORKING ON



Systems

✧ PART TWO ✧

The best systems to put in place are systems that work for you. If you just put systems in place without taking your home and life into consideration, they're just empty systems. Let's put systems in place that work, make your life easier, and help you get to that paper-less home you need.

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Ideas for Ending Paper Clutter



DEAL WITH IT DAILY. The #1 secret to keeping paper clutter to a minimum is to deal with it daily. Processing mail, school papers, and any other paper that makes its way into your home right away is the best way to keep it from becoming overwhelming.



IN/OUT BASKETS. Set up baskets or bins where you can put mail or paperwork that you're dealing with or something that needs to go out. If this is too much or if you feel like you have a good handle on this, a spot for mail can be helpful too.



PLACE FOR OTHER PAPERS. If you have kids that are bringing paper into the house, put a system in place for their papers too and teach them how to use it. We use a three file holder for the kids' daily work or papers that need to be looked at, filled out, and/or filed.



GET RID OF UNWANTED MAIL. There's a free app called PaperKarma – just scan your unwanted mail, they contact the sender, and the mail is gone. TrustedID is another company that gets rid of unsolicited magazines and junk mail (for free). If you're sick of getting those pre-screened credit offers you can go online to Opt Out PreScreen get off that list.



SCAN IMPORTANT PAPERS. Save them to an external drive or cloud storage. Most printers have a scanner that you can use or feed important papers into. Evernote and Dropbox provide online storage for important papers.



SEND CARDS & INVITATIONS DIGITALLY. I love Minted and Paperless Post is for darling cards. I use Minted for Christmas cards and keep our address book in there so they can add it to my cards. When it comes to kids party invitations, I like a quick email invitation with the RSVP included. I do send out handwritten birthday cards to friends and family.



STORE PHOTOS DIGITALLY. I use Amazon Photos, Shutterfly and DropBox, but there are many options available to slim down those picture stacks. Print a book once every year and you'll be on your way to keeping those photos updated. If you're behind, start with the current year and work backwards.



STORE PDFS & PRINTABLES DIGITALLY. I store PDFs in Dropbox too. Set up a folder for each category and you can quickly find any printables you need. With everything stored in the cloud, it can be found on any device. You can use printables paperless with an app like Notability. Use an app to digitally write on your PDFs and you can take your notes with you anywhere. Not only is this a great way to save on the paper trail but it also gives your PDFs portability.

Systems to Eliminate Paper Clutter Checklist

Use this checklist to keep track of what your paper clutter progress and your goals for getting your paper clutter under control.

DEAL WITH IT DAILY	✓

IN/OUT BASKETS	✓

PLACE FOR OTHER PAPERS	✓

SCAN IMPORTANT PAPERS	✓

STORE PHOTOS DIGITALLY	✓

GET RID OF UNWANTED MAIL	✓

SEND CARDS & INVITES DIGITALLY	✓

STORE PDFS & PRINTABLES DIGITALLY	✓



Set Up a Home Filing System

✦ PART THREE ✦

A home filing system doesn't have to include folders and a filing cabinet. Let's set up a simple filing system that works for you!

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Set Up a Simple Filing System

Here are 3 simple ideas that you can use to get started. These can be used alone or in some combination together.

CHOOSE WHAT WORKS FOR YOU...

- **IN + OUT BASKETS:** Anything that you are processing goes in 'in' and anything that you need to bring or send somewhere goes in 'out'.
- **THE 3 FOLDER SYSTEM:** Choose three main topics to file paperwork and create a folder for each one. We use this system for paper that's still in process for the family and store the folders in the kitchen in a desk organizer with pens, pencils, scissors, stamps and other daily-use items. I use three file folders and each one is labeled as one of these three topics: Coupons, School, In Process. Here are some ideas to get you started: Coupons (paper coupons and gift cards), Invitations (birthday invites, wedding invites, grad parties, etc), School/Work (field trip forms, school calendars, work info), In Process (anything that's still in process goes in this folder).
- **BY NAME:** Everyone gets their own folder and they deal with what's in it weekly (this is harder to control but can work!).

NOTES:

Paper Piles Checklist

Let's get started with some paper piles! Paper clutter can be overwhelming, let's start with some simple tasks to help us minimize the paper clutter and go from there.

CURRENT PAPER CLUTTER	✓
go through any existing paper piles	
file invites or info that will be needed later in your in process or out folder	
get rid of what magazines, catalogs + newspapers you can	
put important school schedule dates on your calendar + toss papers	
sort bills you haven't dealt with yet	

	✓

MEMORABILIA	✓
birthday + holiday cards	
go through photographs	
kids art work + school memories	
old magazines + newspaper clippings	
family pictures, 1-5 years old	
family pictures, 6-10 years old	
family pictures over 10 years old	
yearbooks	
extended family pictures	

NOTES: _____

How to Set Up a Filing System

MAIN CATEGORIES

- MONEY
- TAXES
- MEDICAL
- INSURANCE
- HOME
- AUTO
- BUSINESS

MONEY SUBCATEGORIES

- **JANUARY - DECEMBER:** separate file for each month for the year
- **BANK ACCOUNT:** bank name (separate file for each account)
- **CREDIT CARD:** credit card name (separate file for each account)
- **LOAN:** loan name (separate file for each account)
- **PAID OFF:** any bill, loan or credit card that is paid off in full for the current year

TAXES SUBCATEGORIES

- **PAYSTUBS:** person (separate file for each account)
- **RETIREMENT:** person (separate file for each account)
- **TAX:** one for deductions, donations and expenses
- **TAX RETURN:** current year, separate folder for each year

MEDICAL SUBCATEGORIES

- **FAMILY:** one for each family member
- **MEDICAL:** one for dental, prescriptions and vision
- **PAID:** doctors' bills

INSURANCE/HOME/AUTO SUBCATEGORIES

- **INSURANCE:** one for accidents, auto, homeowners, life and personal articles
- **HOME:** one for address, improvements, landscaping, mortgage and warranties
- **AUTO:** service and one for each car

BUSINESS SUBCATEGORIES

- **LICENSES:** one for each
- **CONTRACT:** by company name
- **OTHER:** relevant to your business



Resources

✦ PART FOUR ✦

Use the resources to cut out as much paper as possible and be ruthless about excess paper in the house.

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How Long to Keep it for Guidelines

Remember to have three categories for all paper:

TOSS

recycle or trash

FILE

put this in a place for safekeeping

SHRED

don't need this and no one else does

1 MONTH
receipts (non-deductible items)
deposit / ATM slips
reconciled bank statements

1-3 YEARS
checkbook ledgers
paycheck stubs
mortgage statements
insurance records (expired)
charitable contributions
all business + income related documents
proof of deductible purchases
receipts for charitable donations

AT LEAST 7 YEARS
state + federal income tax returns
w-2 + 1099s
medical bills + statements
contracts
receipts used as tax deductions
canceled checks
mileage records
real estate tax forms + records

FOREVER
birth certificates + passports
marriage / divorce papers
auto titles
mortgages
investment statements
home improvement receipts (for insurance)
wills
medical records
education records
pension + retirement plans
contracts + property agreements

Paper Sorting Guide

CURRENT PAPER CLUTTER	✓
go through any existing paper piles	
file invites or info that will be needed later in your in process or out folder	
get rid of what magazines, catalogs + newspapers you can	
put important school schedule dates on your calendar + toss papers	
sort bills you haven't dealt with yet	

OTHER	✓

MEMORABILIA	✓
birthday + holiday cards	
go through photographs	
kids art work + school memories	
old magazines + newspaper clippings	
family pictures, 1-5 years old	
family pictures, 6-10 years old	
family pictures over 10 years old	
yearbooks	
extended family pictures	

OTHER	✓

