

Sort It Out: A Simple Guide to Decluttering and Organizing Documents



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Does the clutter in your living space cause you stress? Do you have at least one room that is off limits to guests? Is the clutter a cause for conflict with other family members? Do you want less clutter but you are too overwhelmed to begin? Many of us struggle to keep up with the clutter in our lives. Over time, people accumulate unused and unnecessary items, which leads to cluttering living spaces.

So, how do you start decluttering? If you want to be organized, every item must have a home. You can't put something away if it doesn't have a home. If you do, you're just stashing stuff, and you'll probably never be able to find it again. Here is a strategy to try - get four boxes. Pick up items individually and decide which container they go in as quickly as possible. Your four boxes should be labeled with keep, donate, sell, and garbage. Try putting the items that you want to keep in your laundry basket. It's easy to carry, and you can easily see the things that you put in it!



Having a home for an item should mean that there is only one logical place for you to look for it. For example, there should be only one place that you keep your old tax records. There should only be one drawer where you would find your socks, and only one place where your child will find favorite puzzles or stuffed animals.

Tips for Making this Approach Effective

- Use a timer. If you have only a little time to work, setting a timer will help you keep focused and working efficiently. Don't leave the room at all during that time, especially not to return an item to another room.
- Make a decision. When you're having difficulty deciding what to get rid of, ask yourself these questions
 - How long has it been since I used this?
 - Do I like it?
 - Does it work properly? Be realistic about repairing broken items. Many items cost more to repair than to replace; some items cannot be repaired. If you've already replaced the item, it's unlikely you'll ever repair the old one.
 - Do I have more of this kind of thing? How many do I need?
 - If I keep this, what will I get rid of to make room for it?
 - Can I locate this information somewhere else (probably on the Internet) if I need it?
- Have a buddy. This is especially helpful if you're planning to work for a lengthy period of time at one stretch. You will probably run into items that are difficult for you to decide what to do with. And you may reach a point where you feel you can't make decisions any more. Have a good friend, sibling, or your spouse with you. It will make the task less burdensome, and they may help you decide what to do with the tougher items.
- Recycle unused gifts. Keep unused gifts with your "gift inventory"—those things that you purchase ahead of time for gifts. Use them when you need a gift on a moments' notice, or when you know the item is a good choice for a recipient.
- Shred or tear up documents you intend to toss that contain personal information.

Things to Remember

The benefits of decluttering are appealing, but remember that barriers can exist. The task may feel overwhelming, making it difficult to get started. Emotions also play a role because certain items evoke memories. I recommend starting small by prioritizing goals and establishing an action plan. Try focusing on one area, one closet, one shelf or one drawer at a time. You will feel accomplished when one task gets done and be more motivated to tackle other areas in the home! People are often reluctant to get rid of things because of the original cost, but some of that money can be recouped by reselling. If donating, request a receipt for tax purposes. Lastly, once the clutter is cleared, stay on top of it. Make it a point to put things away and clear out new accumulations regularly. Adopt a one-in-one-out rule. For each new item brought in, get rid of a similar item.



Quick Tips for Paper Clutter

- **Ask yourself:** Is this useful? Is the information current? How hard would it be to get this information again later? Is this piece of paper helping me achieve my goals?
- **Active:** Active papers are items that need your attention or that you use frequently. You'll want to keep them where you can get to them easily. They may include current bills and current receipts. You can usually dispose of these after 30-60 days unless they are needed for tax purposes or some other documentation.
- **Keepers:** These are papers you want to keep but they typically don't need to be accessed as frequently as "active" papers. Organize some type of file storage for tax documents, medical records, warranties, etc.
- **VIP's:** This is short for "Very Important Papers." These papers usually need secure storage such as a safety deposit box or fireproof safe. They include social security cards, birth certificates, passports, power of attorney, property titles, etc.
- **Discards:** One of your most important strategies in the battle against paper clutter is to regularly discard junk mail, school papers, magazines, catalogs, and old receipts. You may think you need to keep those old receipts. You typically only need to keep receipts for about 30 to 90 days. Keep receipts long enough to verify that the expense is correct on your bank statement or credit card statement! After that, you only need to keep receipts for very expensive purchases or for items that you plan to deduct on your taxes.
- Old canceled checks and bank statements (unless needed for tax purposes or proof of purchase).
- Statements from credit cards and utilities can usually be discarded after you've checked to make sure that all charges are correct and paid the current bill.

Shred or otherwise destroy any statements, documents or records which contain personal or financial information after they are no longer needed.

Keeping important documents organized at home ensures easy access, security, and peace of mind, especially in emergencies. Having a designated system for storing documents like birth certificates, passports, tax records, and insurance policies helps prevent loss or damage and saves time when they are needed. In the event of a fire, flood, or natural disaster, having important paperwork stored in a fireproof and waterproof safe can prevent devastating losses and make recovery easier. Organization also helps with financial management by keeping bills, receipts, and investment documents in order, making budgeting and tax preparation more efficient. Properly stored documents protect against identity theft and fraud, especially when sensitive information is kept in a secure, locked location.

Additionally, organized records simplify estate planning, ensuring that wills, power of attorney documents, and property deeds are readily available for loved ones when necessary. By maintaining a structured filing system—whether physical or digital with cloud backups—households can avoid unnecessary complications and ensure they are prepared for any situation that requires official paperwork.



Setting Goals to Keep Documents Organized

Organizing important papers is not going to happen overnight. You need to set realistic goals. Here are examples:

- **Short-Term Goals** - Should be completed in less than three months
 - Set up a home office. Find your space and assemble your supplies.
 - Order a copy of your credit report!
 - Purchase a safety deposit box that is waterproof and fireproof.
 - Begin to inventory and organize papers. Do you need to replace any documents/records?
- **Intermediate Goals** - Should be completed in three to six months
 - Complete household inventory. Take photos or a video of the things that you own that are valuable.
 - Set up a cloud storage account and add scanned copies of documents to this folder. Examples of cloud storage include Google Cloud, Box, OneDrive, and DropBox.
 - Complete your inventory and organize your files in cloud storage.
 - Set up an appointment with an attorney to write or review your will.
 - Finish replacing important records you have lost.
- **Long-Term Goals** - Should be completed in a year or more
 - Develop a system to track your expenses.
 - Establish a regular annual time to review your records.

