

PAPERWORK ORGANIZER

Paper Triage

PAPER BY PAPER

PAPER / PURPOSE	STATUS	NEXT ACTION	LOCATION

STATUS

ACTION

WAITING

A waiting paper needs something before the next step.

REFERENCE

DISCARD

THE STEPS

- ☐ Begin with a recent batch
- ☐ Decide its status
- ☐ Verify any date
- ☐ Write a next action and location
- ☐ Keep the confirmation
- ☐ Choose a review cue

SUBMITTED AND WAITING

STATUS	CONFIRMATION · FOLLOW-UP
 SUBMITTED	
 WAITING	
 REFERENCE	

KEEP WITH IT

CONFIRMED DATE
/ SOURCE

SUBMISSION /
CONFIRMATION

WAITING /
FOLLOW-UP

REVIEW CUE /
RETURN NOTE

TIPS AND REMINDERS

- Choose one paper. Write its status, next action, and location.
- Read the action or waiting row. Check whether a response arrived. Update the status before continuing.
- After you try it: Can you tell whether the item is unstated, submitted, or waiting for a response?

STATUS SYMBOLS


ACTION


WAITING


REFERENCE


DISCARD

PAPERWORK ORGANIZER

Decide what each paper needs before filing it. Record the next action, confirmed date, and location. After submitting something, keep its confirmation and the follow-up information together.

THE STEPS

Organize Paperwork at Home: Keep the Action Attached

A paper can be filed neatly and still have an unfinished task. Track its status as well as its storage place.

- 1 BEGIN WITH A RECENT BATCH**
Use one tray or a few new papers. Not every file in the house.
- 2 DECIDE ITS STATUS**
Action, waiting, reference, or discard. A waiting paper needs something before the next step.
- 3 VERIFY ANY DATE**
Use the date on the actual document or the organization's instructions.
- 4 WRITE A NEXT ACTION AND LOCATION**
Describe the physical next step and where its materials are.
- 5 KEEP THE CONFIRMATION**
After submission, record the receipt or reference and the follow-up information actually supplied.
- 6 CHOOSE A REVIEW CUE**
Review the action and waiting items. For how long to keep a document, check the official source for that document.

AN EXAMPLE

Fictional form: check the deadline on the notice. Write “complete section B” and record the folder location. After submission, note the receipt reference and any follow-up date supplied. The record now says Waiting instead of looking like an unstarted form.

THE SMALLER VERSION

Choose one paper. Write its status, next action, and location.

WHEN YOU COME BACK

Read the action or waiting row. Check whether a response arrived. Update the status before continuing.

AFTER YOU TRY IT

Can you tell whether the item is unstarted, submitted, or waiting for a response?

Examples on this page are made up. Use your own dates and details.