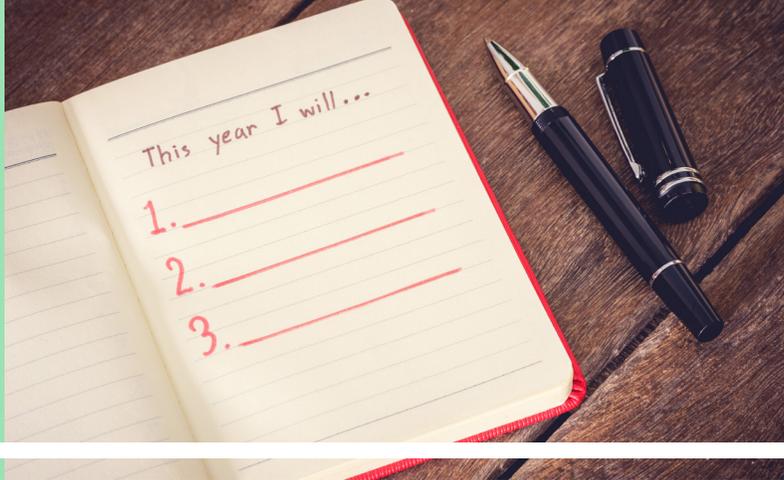


# ORGANIZING FOR THE NEW YEAR CHECKLIST



## CLEAN OUT THE FILES

It's important to take time once a year to purge the old paperwork in your active files and make room for the new. Ask yourself whether or not documents will be relevant to your work in the coming year. If you might need to refer back to those papers at some point in the future (for legal, tax, or other reasons), move those items to an archive file. And if you find papers with no logical home in your filing system, create a new folder with the appropriate category.

- Desktop files
- Client files
- Completed projects
- Financial files
- Receipts
- Reference files
- Tax files
- Journal articles
- Move items that need to be kept long-term to an archive file
- Create new categories if needed

## TAKE A LOOK AT THE OFFICE

Office clutter can take over throughout the year — you get busy, create a few piles here, a stack over there, and suddenly you can't see a single horizontal surface! Go around the room and collect up every homeless item you find, creating a set spot for each.

Having an assigned storage space for everything makes it easier for you to maintain order after the first of the year. Just take a few minutes at the end of each day to put things away (not hard when you know where everything goes!)

- Supplies and equipment: Only keep what you use on a regular basis at your desk — then store the “extras” in a cabinet or closet.
- Books and periodicals: Store journals in a magazine holder grouped by title or topic.
- Reference manuals: Keep loose brochures and sets of papers in expanding files or 3-ring binders with Index Dividers between topics.
- Multimedia: To save space, remove CDs and DVDs from their jewel cases and store them in file folders with self-adhesive CD/DVD pockets.
- Blank stationery items: Neatly stored in either stacking trays or a document sorter.
- To-do's: Set up a desk file sorter or hanging files with categories for each type of action — “to call,” “to pay,” “to file,” “to read,” etc.

## MAKE SOME PLANS

If you ended the year wishing you had accomplished more, now is the time to take a look at what got in your way. Decide now what you would like to accomplish in the next year, then plan some uninterrupted time in your calendar to work toward these goals.

- Re-evaluate last year and what could be improved upon
- Write down your new goals for the new year
- Plan and dedicate time in your calendar to work towards new goals
- Check-in at scheduled intervals to track your progress