

Paper Triage Checklist

KickOutClutter.com — Print and check off as you go.

Sort all incoming paper quickly into Action, File, or Recycle/Shred. Build a small mail station and keep a short weekly admin block.

Supplies

- Three bins/folders: Action (Do/Pay), File (Keep), Recycle/Shred
- Letter tray or 3-slot vertical sorter
- Labels/marker, stapler, paper clips
- Shredder or shredding bag
- File folders: Bills, Taxes, Medical, Home, Auto, Insurance, School, Receipts (current year), Manuals

Quick Rules

- Handle new paper once: sort immediately to Action / File / Recycle-Shred.
- Open envelopes, remove inserts, and recycle junk on the spot.
- Keep only what serves a purpose; digitize when possible.
- Redact or shred anything with personal info.
- Go paperless for bills/statements whenever you can.

1) Clear & Stage (5 min)

- Clear a flat surface and set up labeled bins (Action / File / Recycle-Shred).
- Gather all loose piles from counters, entry, desk, and bags.

2) Quick Triage (10–15 min)

- Sort everything into the three bins without deep reading.
- A small 'Review' mini-stack is okay — limit to 10 items.

3) Action Pile (10–20 min)

- Sub-sort into: Pay, Call/Email, Form/Sign, Errands/Returns.
- Add due dates; set autopay when possible.
- Put tasks on calendar; use a weekly admin block.

4) Bills & Money (10–15 min)

- File current-year paid bills if you keep them; plan to shred older.

- Download statements and choose paperless delivery.
- Keep current insurance cards accessible in wallet/vehicle.

5) Taxes (10–15 min)

- Create folder 'Taxes YYYY' for W-2/1099, receipts, interest statements.
- Add donation receipts and major purchase proofs.
- Keep past returns per your tax professional's guidance.

6) Medical & Benefits (10–15 min)

- Keep vaccination records and key medical summaries.
- Save final EOBs and policy info; recycle duplicates.
- Store emergency contacts and allergies card.

7) Home / Auto / Manuals (10–15 min)

- Warranty & receipt folder for appliances and repairs.
- Auto: title, registration, insurance, maintenance log.
- Manuals: keep essentials; download PDFs and recycle extras.

8) Kids / School (10–15 min)

- Create an 'Inbox' for school papers; empty weekly.
- Enter dates into your calendar; permission slips to Action.
- Memory box for keepers; photograph bulky art.

9) Shred / Recycle (5–10 min)

- Shred anything with SSN, account numbers, medical details.
- Recycle non-sensitive paper; remove plastic when needed.
- Note local community shredding events (optional).

10) Mail Station & Maintenance (5–10 min)

- Set up a 3-slot sorter: Action / File / Recycle-Shred.
- Add stamps, envelopes, a shred bag, pen, sticky notes.
- Daily 2-minute mail sort; weekly 10-minute file; monthly archive purge.