DOCUMENT MANAGEMENT TIPS

1. **Create a document naming and filing system** that everyone at the location can use easily and have everyone agree to use it.

2. **Use simple broad titles for files**. If you label a file "Documents Used to Create Annual Budgets," you will end up with an unmanageable and incoherent stack of papers. Instead, use a term like "Annual Budget 2014 Supporting Materials" and file the pertinent materials there with a file labeled "Annual Budget 2014," which is for the final budget itself.

3. **Organize files around retrieval**. The goal is easy retrieval. Some files are logically organized alphabetically by subject matter, others numerically by subject matter. Avoid putting documents together under "Food for Thought" and filing them under "F."

4. **Assign destroy by dates to your files**. It is easiest to do this as you complete work on a file. Follow the Record Retention Schedule (also sorted by category and record type; see Directions for Using the Record Retention Schedule) and mark the documents by their "expiration" date. This practice will help the person charged with policy compliance to carry out the policy.

5. **Sort and file paper**. Develop the practice of sorting and filing documents weekly. Start with whatever documents are not yet filed away and do something with each piece.

6. **Collaborate on creating documents using software programs that allow sharing,** e.g., SharePoint or Word (using Word's "Review" function). These allow you to track versions of a document and let you know which is the most recent version. This practice prevents the buildup of multiple drafts in the files of each person who has touched a document.

7. **Share data and information on secure electronic communications systems**. Documents stored electronically are easier to manage, archive, and share than traditional paper notes. Most operating systems enable you to organize documents into files, add notes, set up tickler systems, "to do" lists, synchronize calendars, etc.

8. **Clean up the email or text box regularly.**
    a. Read each message once, answering this question quickly: "Am I being asked to do something?" If so, there are only three possible actions:
        i. Take action on the task now. Follow the two-minute rule: If you can do what's being requested in less than two minutes, do it immediately.
        ii. Delegate: Pass the task along to the person best equipped to handle it.
        iii. Defer: Consciously decide you will do the task later. Either add the task to your "to do" list or schedule an appointment with yourself to complete it.
    b. Set up rules for sorting messages as they come in. Microsoft Outlook can place incoming messages into files by name of sender, subject matter, key words, etc.
    c. Follow the Record Retention Schedule for how long to keep documents that you receive as email or texts.