“Clean Up Your Office”

by Cherie Sohnen-Moe

The flowers are blooming, the sweet smell of nectar is wafting through the air, and the birds are chirping. Accompanying these blissful heralds of the changing season are the roars of vacuum cleaners, clouds of dust, and stacks of boxes. Yes, it is that time of year spring cleaning!

Spring is a traditional time for clearing out closets and storing winter gear. It is also when business owners tend to clean out files and reorganize their offices. To make this process run smoothly, make sure you have the proper supplies such as storage boxes, masking tape, scissors, markers, file folders, a trash can, a paper shredder, a dust cloth, and a recycling bin.

Review your files and purge outdated or irrelevant materials. Discard all those instruction manuals on equipment you no longer use. A common contributor to clutter is keeping numerous copies of the same item. Usually one copy is enough although you might keep a duplicate if the item has an artistic value (e.g., a beautifully designed, multi-colored brochure).

I highly recommend using a paper shredder if the information to be disposed of is related to clients or finances. Keep in mind that you should keep all financial receipts for at least 6 years. Records related to the basis (cost) of property and equipment should be kept indefinitely. Copies of tax returns should be kept for at least ten years.

Put inactive files and past records in storage boxes. Label the boxes and put them in a secure place. Archived files should be kept in a separate filing cabinet or storage box. Store your critical financial records in a fireproof case or take them to a place that specializes in archiving documents (this also holds true for computer files).

Organize your office and create a workable filing system so that spring cleaning is easier next year. Two keys to avoiding clutter are: designate a proper place for keeping your records; and establish a routine for when and how you will attend to specific tasks.

Get Organized Now!
The first step to getting organized is to establish a space that's dedicated exclusively to your business. This area would include the following: a writing surface (preferably a desk); an ergonomic chair; a desk lamp, a filing drawer or cabinet; and a collection of office supplies. Arrange supplies and equipment according to the business task. Follow the old adage: "A place for everything and everything in its place."

Not being able to quickly find needed information is the most common form of office inefficiency. This applies to paper systems as well as computers. Consider the various business activities you engage in and design a structure to deal with them. Key activities include handling mail, managing phone calls and messages, storing and accessing contact information (names, addresses and phone numbers), maintaining client files, keeping financial records, working on projects; and gathering articles and other materials related to your business.

Minimize handling of paper. Begin by dividing all paperwork into three initial categories: Take action; file; or get rid of it. The primary purpose of a filing system is easy retrieval, not storage. Ideally you would have at least three separate filing drawers:
1. For client records;
2. For current projects, upcoming events and financial management;
3. For resources.

Mail
We spend an incredible amount of time dealing with mail. I suggest setting a specific time of day to open mail.

Avoid going through your mail if you do not have the time to appropriately process it. The goal is to handle mail once. First, choose a place for opening mail that's next to a filing center, trash can and paper-recycling bin. Use a letter opener it saves time, keeps things neat and most importantly, alleviates paper cuts. Whenever possible, take immediate action such as write a return letter, file the information in resources, or trash it.

Phone Calls and Messages
The key to managing the telephone is to be prepared logistically and mentally. You don't want to keep callers waiting while you search for supplies or information. You do not want to keep callers waiting while you search for supplies or information. Store needed provisions (e.g., paper, pen, appointment book, and new client checklist) within reach. Keep a message pad next to the phone and return calls within 24 hours.

Contacts
It is important to keep track of contacts and potential business resources. Use your computer contact manager or place sheets (purchase pre-designed forms or make your own) in a binder with alphabetical dividers. Each contact has a separate sheet. Some of the information to include is the person's name, company, title, work address and phone number, home address and phone number, who referred you, where you met, any personal or professional information that you want, and action to be taken. Transfer the items from the action to be taken section to your tickler file or appointment book. You might also want to list the dates and times of any actions (e.g., telephone calls, meetings) directly onto the contact form. This is particularly helpful as a document to record business interactions. For example, you get a bid for supplies over the phone and you place an order. Then you get your bill, and it's for a different price. You are more likely to resolve the difference in your favor if you are able to say, "I talked with Ann Alleby on Tuesday, August 17th, at 3:20 p.m. and was told...." That you kept such precise records gives you credibility.

Storing business cards can be a source of frustration. They can be filed by name, company, or type of business. Choose a method and stick to it. Otherwise, you'll spend a lot of time attempting to remember which way you filed that specific card. If you have three cards for every person then you can file by each category (the downside to this option is that your business card holder will get filled extremely quickly). Options for storing business cards include using a Rolodex type of system, inserting cards in sleeves that are specifically designed for business cards and then placing those sleeves in a binder, or stapling the cards to contact sheets. A hint for making your business card collection more useful is to write on the card the date you met the person, where you met, and any other information you want to remember.

Client Files
Keep client files in alphabetical order. Determine what client information and forms you want included in each client folder. Design a one-page checklist and staple it to the left side of the folder. On the top of the form put the client contact information. Then include other details that you deem important such as: who referred the client; insurance data; and physician contact information.

Designate a section that lists filled-out forms to be put in the folder (e.g., client intake, health history, insurance verification, physician referral, treatment plan, and informed consent). Be sure to leave space next to each item to put the date when the form was placed in the file. If you do not have a computerized tickler file, consider putting a follow-up section on the bottom of the page, so you can easily see when you last made contact.

Review all client files at least twice a year. See if you can reestablish connections and if not, consider these inactive files and archive them.

Note: If you do a lot of work on the road, purchasing a portable file carrier is a good idea. Stock it with your promotional materials, client materials (e.g., intake forms, informed consent forms, SOAP charts, and educational handouts), an envelope for receipts, and supplies (e.g., a calculator, receipts, pens, and paper clips). Each morning, go to your master filing system, pull the client files on the specific clients you'll be seeing that day, and add those files to the portable carrier.

Projects

Create a separate file for every project you are working on. Whenever you come across information pertaining to a particular project, immediately put it in the proper folder. Once the project is complete, sort through the file and put into your resource folders any information that could be useful in the future. Then archive or throw away (if possible, recycle) the rest of the file's contents.

Upcoming Events

Develop a tickler file for upcoming events. A tickler file reminds you of your commitments and assists in follow-through. Essentially, it contains 12 separate sections (one for each month) and a set of dividers numbered 1-3, for each day of the month. You can put these in a three-ring binder, an accordion file or hanging files. (Office supply stores carry a variety of these systems.) Place the 31 dividers in the "Current Month" section. Then, if someone asks you to contact them in two weeks, you go to your tickler file, turn to the corresponding date and make a note to call that person. Check your tickler file daily. Look at the current day and possibly the next two days. If you have a computer, you can purchase planning software programs that include tickler systems.

The true beauty of a tickler file is not so much in recording short-term information but for keeping track of future events. For example, a client is going out of town for the summer and asks you to call back on September 12th. You put a note in the September section of your file. When it's the end of August and you are transferring your 31 dividers to September, you would put the note under 12. Using this system frees you from having to actively remember everything and helps ensure that you won't forget your commitments. Various computer programs do this automatically. Even though I have a computerized tickler system, I keep a physical tickler folder for paperwork associated with the activities on the various dates. For instance, if I have a telephone appointment scheduled with someone, I put any information about the person or subject into the tickler section for that day.

Financial Management

The rule of thumb for financial record keeping is: Keep all receipts. A corallary is: Jot down expenses when receipts are unavailable. Keep all receipts in one place and post them on either a weekly or monthly basis to ease the paperwork burden at income tax time.

There are two major ways for keeping financial receipts: by the category (place receipts in separate folders according to type, such as "Marketing Expenses"or "Supplies"); or by the date (one file folder for each month of the year). Keep in mind that even if you are doing your bookkeeping on a computer, you still need to keep receipts.

Resources

This group of files tends to get extremely unwieldy. Store magazines and journals on a shelf, and put newsletters into a binder. For loose papers, begin by sorting resources by subject. Oftentimes you'll find an article or piece of information that could go in several places. A solution is to make copies and put them in the various places. A paper-conserving idea is to put the information in one folder, and then make a note on the inside of the other folders referencing the folder where the information is stored. You can significantly reduce the amount of paper you accumulate (particularly magazine articles) if you have a computer, a scanner, and a good cross-indexing program. If you need materials from your resource files to go into a project folder, either make a copy or make a note in the resource folder where the information is being temporarily housed.

The Paperless Office

The paperless office is still a dream for most of us. Even with the advent of scanners and e-mail, a lot of paper passes through our hands on a daily basis. Many therapists rely on paper for their client records and financial management. I highly recommend using a computer as much as possible. Time is the most important commodity practitioners possess. The increased productivity, time saved, and enhanced service which automatically provides will more than compensate for your learning-curve efforts and expenditures. Surveys indicate that the number of therapists owning computers continues to rise dramatically. Computers are used for researching, communicating, maintaining client files, managing finances, marketing, desktop publishing, electronic insurance billing, and archiving data. Now there are programs designed specifically for massage therapists that keep client notes and process insurance forms.

Several inexpensive, user-friendly accounting programs are available that can easily be utilized by massage therapists. These software programs can print your checks and post the information in the appropriate places. The software usually includes a tutorial that walks you through the setting up your accounts. Your responses to the questions it poses enable the computer to determine how to organize your files.
It is so much easier to know where you stand and to plan the future because the information is right there. You simply go to the Reports icon, where it lists all the major standard reports. All you have to do is highlight the dates (e.g., Last Month or Current Fiscal Year to Date) and, in a matter of seconds, a report is prepared one that could easily take hours by hand.

You can also examine expenses by category, such as creating a report of all your automobile expenses for the year. The reports can combine information from all of your accounts (e.g., checking, credit cards and petty cash). Let's say that XYZ Supplies Co. sends you a notice for an outstanding invoice. You're fairly sure you paid for it, but you don't remember the payment method. If you only kept manual files, it could take you 20 minutes (or more) to sort through all the various ledger sheets and receipts. With a computerized accounting package, it takes moments.

You can begin the process of creating a paperless office by ruthless throwing away old paperwork, minimizing the number of times you handle a piece of paper, and refraining from duplicating information.

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Sidebar:

Filing Tips

Managing Paper:
* File materials immediately
* Files should be in use or put away
* Put the most current materials in the front of the file
* Label the file folder
* Separate active files from archive files
* Don't overstuff folders create subfiles
* Color code files
* Ease filing by reducing oversized documents to letter size
* When a project is finished or a client is inactive, remove extraneous material from the file and archive it

Organizing Computer Information:
* Use the same names for directories, folders and files that you label your paper documentation storage
* Back up your files regularly and store them in a fireproof box or preferably off premises
* Each day delete unnecessary automatic back-up files
* Eliminate inactive files on a monthly basis

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