

Filing

(A resource for community advice offices and community-based paralegals brought to you by NADCAO, from the Paralegal Manual published by the Education and Training Unit and the Black Sash.)

Filing means keeping information (papers, letters, addresses) in a safe place. You file information by arranging it in a certain order, so that you or anyone else can find it quickly.

Filing helps you to decide:

- where to put information
- into which file to put a paper
- in which file to look to find a paper
- where to find an address

Filing is important because it:

- helps you not to lose documents
- keeps documents clean and tidy
- helps you to find documents quickly and easily
- helps you to be efficient

What should you file?

The important things to file include:

- all documents that your organisation receives, for example letters, notices, reports, and useful information
- all copies of documents you send out
- documents about the money side of the organisation
- all case sheets and information relating to cases

Filing should be done according to a carefully planned method.

What equipment do you need?

You need the following pieces of equipment for filing:

- files (hanging folders or ringbinders)
- a filing cabinet, shelves or something to keep your files in
- a date stamp to put the date on letters you receive
- an A4 size hard-covered book that you call a 'day-book'

When you start a filing system you need to decide how you want to file. Do you want to file in alphabetical order (for example, using surnames) or in date order (according to the months in the year), or according to issues (such as

grants / HIV/Aids / housing development / etc). Each organisation is different. You should keep your filing system simple and easy for all to operate.

Removing files from the office

Files should never be removed from the office. If documents or statements have to be removed for any purpose, it is better to photocopy them first so that the original remains in the office.