The Evernote Paperless Challenge Checklist

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Paperless Lifestyle Ambassador

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To help you participate in the Challenge, Paperless Lifestyle Ambassador Jamie Todd Rubin has put together a handy checklist. Use Evernote to help you achieve a truly paperless life. Check the boxes as you go...

✅ *One*

Make sure you have the basic tools: an Evernote account; a scanner; a staple remover.

✅ *Two*

Determine the scope of your effort. I recommend starting with just incoming paper.

✅ *Three*

Aim to spend 10 minutes each day going paperless.

✅ *Four*

Decide how you want to organize your paperless data.

☑ *Five*

Consider options for securing and protecting your paperless data.

☑ *Six*
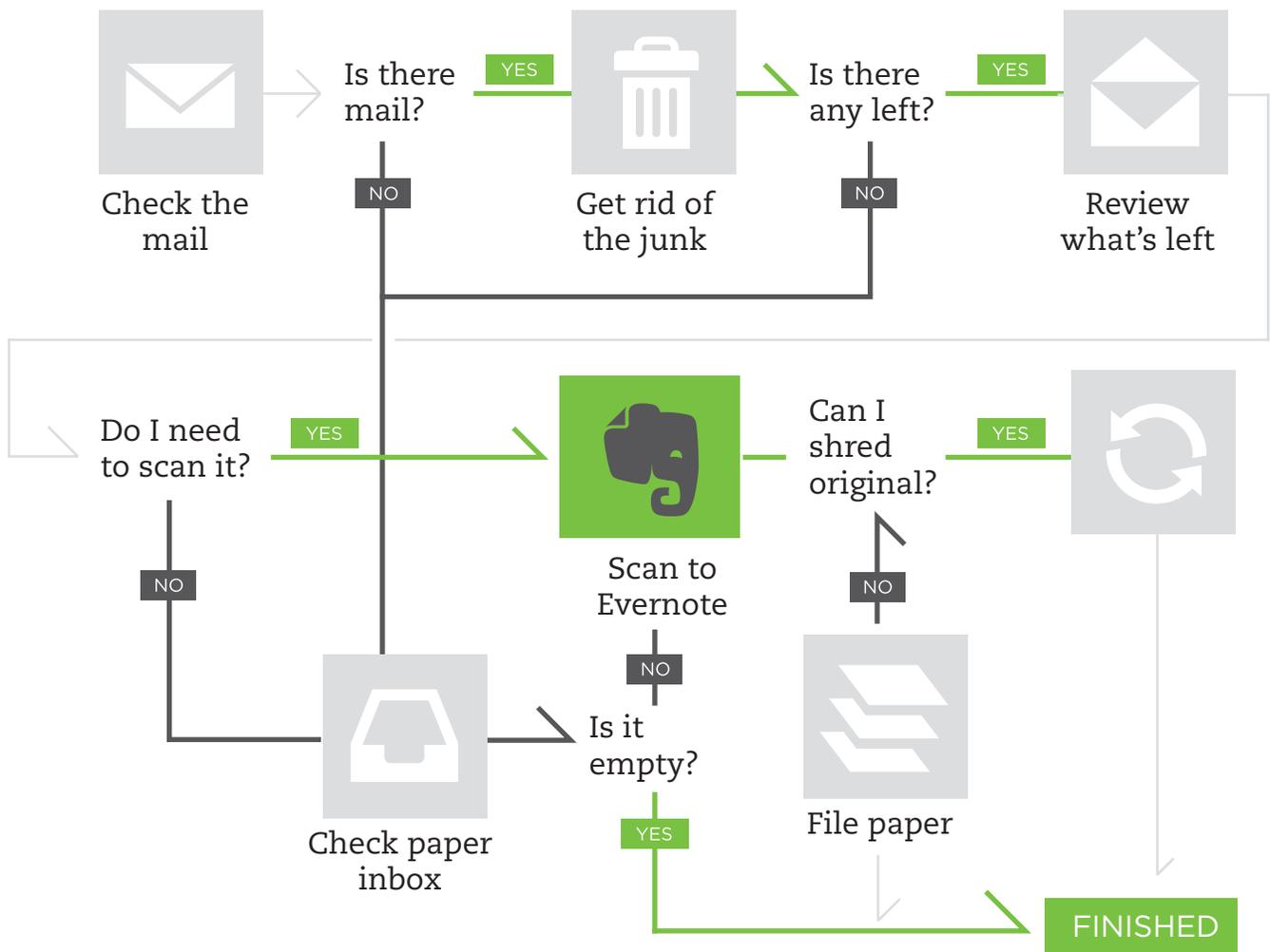
Start scanning! Not sure what to scan? See ideas below.

☑ *Seven*

Convert paper magazine subscriptions to digital subscriptions (you can do this as each paper subscription expires).

☑ *Eight*

Shred and recycle your unused paper.

Jamie's Paperless Flow

Check the mail → Is there mail?
- YES → Get rid of the junk → Is there any left?
  - YES → Review what's left
  - NO
- NO

Do I need to scan it?
- YES → Scan to Evernote → Can I shred original?
  - YES → (recycle)
  - NO → File paper
- NO → Check paper inbox

Scan to Evernote → Is it empty?
- NO
- YES → FINISHED

File paper → FINISHED

What can you scan?

Anything that survives being thrown away!

Meeting notes

Instruction manuals

Greeting cards

Bank statements

Kid's artwork

> "Once you've established a habit, you can go back and scan in old paper."

Deciding what to scan

Scanning documents is just one part of going paperless. There are many other documents that I add to Evernote that are already in electronic format. There is no need to scan them, but the question still remains: **is this worth putting into Evernote?**
Evaluate an electronic document on the frequency you think you'll use it, as well as against your personality type.

☑ *One*
Start with a blank diagram.

☑ *Two*
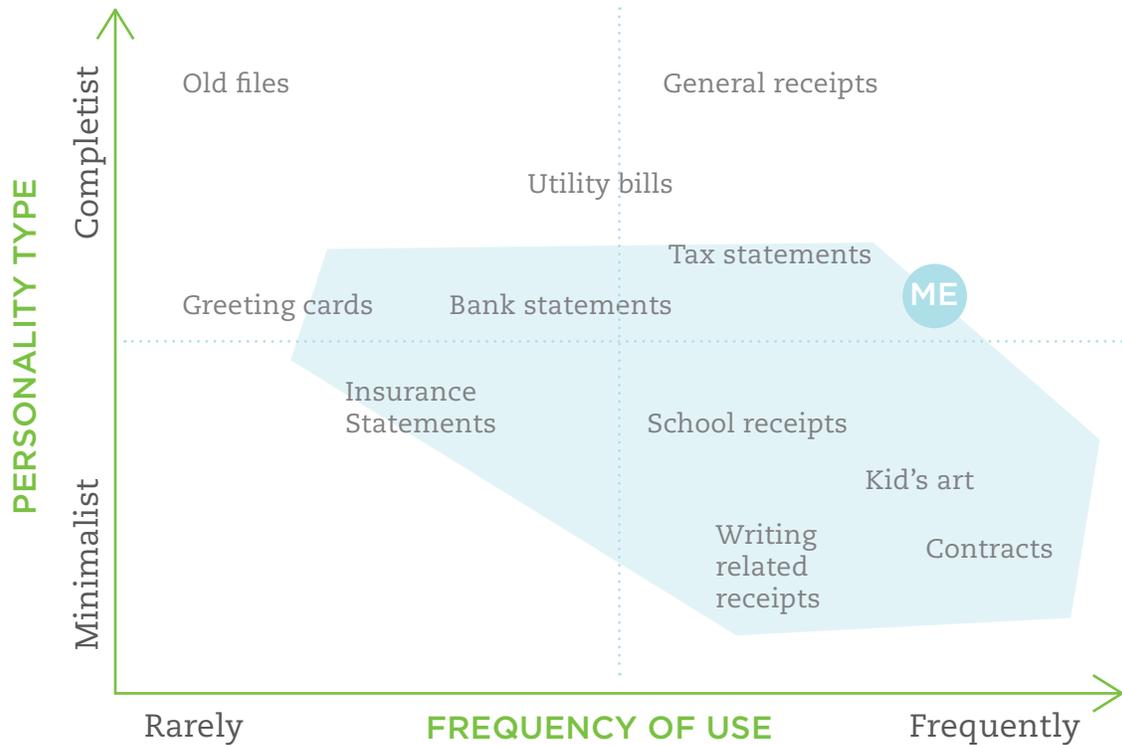Fill in the types of paper documents you have, placing them where they belong on each spectrum.

☑ *Three*
Based on your threshold for frequency and your personality type, draw a shape around those documents you want to scan in.

☑ *Four*
Use the result as a guideline for future scanning.

For example

A scatter plot chart with axes labeled "PERSONALITY TYPE" (vertical, from Minimalist to Completist) and "FREQUENCY OF USE" (horizontal, from Rarely to Frequently). Items plotted include: Old files, General receipts, Utility bills, Tax statements, Greeting cards, Bank statements, ME, Insurance Statements, School receipts, Kid's art, Writing related receipts, Contracts.

☑ *Step One*

Start with the paper that you'll need most frequently and work your way backwards.

☑ *Step Two*

If you are a completist, avoid going back and scanning in your entire filing cabinet, until you've done Step 1.

☑ *Step Four*

Constantly ask yourself, "how often will I use this?"

☑ *Step Five*

Remember that this is a rough framework and it is okay to break the rules or make exceptions if it makes you feel better.