Annual Renewal Calendar

Use one row for each entry and update it when details change.

Service	Renewal month	Notice period	Cost	Action

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Appointment Planning Log

Use one row for each entry and update it when details change.

Appointment	Person	Book by	Scheduled for	Preparation

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Emergency Contact Review

Use one row for each entry and update it when details change.

Contact	Role	Phone	Address	Checked

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Account Recovery Inventory

Use one row for each entry and update it when details change.

Account	Recovery method	Device	Update needed	Notes

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Home File Index for January Personal Admin Reset

Use one row for each entry and update it when details change.

Folder	Documents	Stored where	Last reviewed	Notes

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Membership Renewal Review

Use one row for each entry and update it when details change.

Membership	Renews	Fee	Used this year	Decision

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January Paperwork Checklist

Tick each completed task and add your own steps on the spare lines.

Gather

- [ ] Collect mail
- [ ] Gather annual statements
- [ ] Find receipts
- [ ] List renewals
- [ ] _____
- [ ] _____

Review

- [ ] Check contact details
- [ ] Review insurance dates
- [ ] Check school forms
- [ ] Note upcoming appointments
- [ ] _____
- [ ] _____

File

- [ ] Label folders
- [ ] Shred duplicates
- [ ] File paid bills
- [ ] Back up scanned copies
- [ ] _____
- [ ] _____

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Admin Week Planner

Add dates to the seven day boxes and use the side panels for extra notes.

Week of: _____

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Calls to make

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

Forms to file

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

Follow-up

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____



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Document Request Tracker

Use one row for each entry and update it when details change.

Document	Requested from	Request date	Expected	Received

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Small Admin Tasks Tracker

Write the month, then mark a box on each day you complete a routine.

Month: _____

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Open post	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
File receipt	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Reply to form	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Check calendar	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Update list	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Notes

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