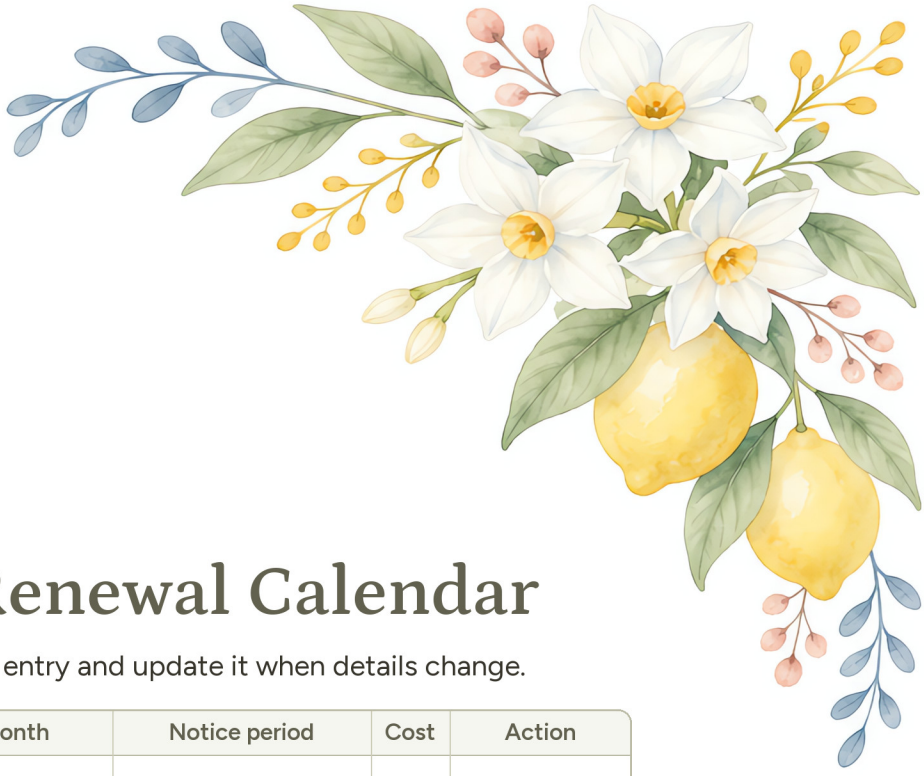


Annual Renewal Calendar

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

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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