ASSEMBLED BINDER

Home Records Binder

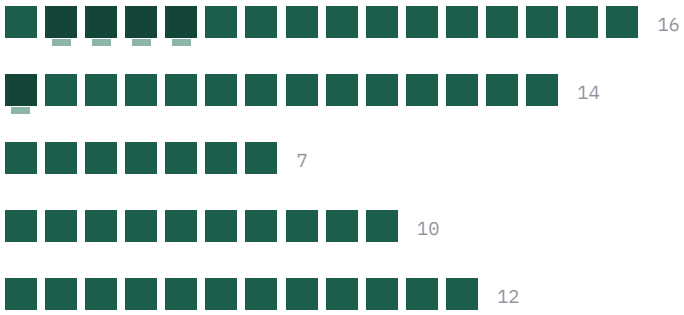
The house file, assembled: the home record sheets in order, with dividers, an index and a set-up guide.

59 free sheets, in order

5 numbered sections

5 worked examples

ONE SQUARE PER SHEET



Underlined: the sheets that also come as a worked example.

THIS BINDER

Property _____ Started _____ Binder no. _____

Notes _____

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The first afternoon

How to turn this file into a working house file in one sitting. Skip anything your house does not have.

YOU WILL NEED

- [ ] A 2-ring or 4-ring binder for 109 sheets, with room to grow.
- [ ] A hole punch to match the rings.
- [ ] Card for the six dividers, if you have it.
- [ ] Scissors and tape.
- [ ] Your phone, for photos of the labels.

STEP BY STEP in this order

1. **Print and punch.**
   Print the binder file single-sided at 100% ("Actual size", not "Fit to page"), or hand the print-shop file and its note to a print shop. Every page sits about 4 mm away from the punched edge, so the holes clear the tables.

2. **Put the dividers in and label the spine.**
   Six dividers: one for each of the five sections, and the pocket divider for certificates and receipts at the back (page 107). Cut out the widest spine strip that fits your binder (page 108).

3. **Start with the house file.**
   Take the shut-off locations sheet (PR-10, page 14) round the house and find the water, gas, oil and electricity shut-offs. Try each one, then write down exactly where it is. Then fill in the new home record sheet (PR-06, page 12). Those are the pages people look for in a hurry.

4. **Photograph the appliance labels.**
   Find the label or plate that carries each appliance's model and serial number, photograph it, and copy the details onto the appliance register (PR-03, page 16).

5. **File the warranties.**
   List each guarantee and receipt on the warranty register (PR-04, page 18), then put the paper itself in the pocket divider. Do the same with each certificate as it arrives.

6. **Add the systems your house actually has.**
   Systems and servicing (section 02) and water, pool and hot tub (section 04) hold a sheet for each system. Keep the ones your house has. Leave the rest out, or keep the blanks at the back.

7. **Keep it going.**
   When a log fills up, file its spare from the refill pack straight behind it: the page it goes behind is printed at the top of each spare. Any page can be printed again from this file.

> **WORKED EXAMPLES**
> Pages 5–10 show five of these sheets filled in with illustrative entries, so you can see what a useful record looks like. They are not a real house, and they contain no service intervals: those come from your manufacturer.

Every blank sheet in this binder is one of the free sheets on the Upkeep Papers website, unchanged. The binder adds the order, the dividers, the index, this guide, the worked examples, the labels and the refill pack.

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Contents

59 free sheets in 5 numbered sections, with the pages that make them a binder. Page numbers are binder pages: each one is printed on its page.

No.	Section	Sheets	Pages	Page
	Start here: the first afternoon			2
	Contents			3
	Index of every sheet, A to Z			4
	Worked examples: 5 sheets filled in with illustrative entries			5
01	**The house file** Purchase, insurance, warranties, appliances, contractors, keys and the shut-offs.	16	24	11
02	**Systems and servicing** Boiler, heat pump, oil, septic, well, solar and the rest of what keeps the house running.	14	22	36
03	**Safety at home** Alarms, extinguishers, gas appliances, ladders and the emergency contacts.	7	13	59
04	**Water, pool and hot tub** For houses that have them: leave the section out if yours does not. Optional section.	10	15	73
05	**Buying, moving and improving** Viewings, surveys, moves, renovation and the meter readings in between.	12	17	89
06	Certificates and receipts: the pocket divider			107
	Cut-out pages: spine labels, front labels			108

In separate files: the refill pack: 22 spare blanks of the logs (36 pages); the dividers again, to print on card; a duplex print-shop file, with a note for the print shop; the set-up guide on its own; one fillable PDF per section, every field named separately.

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Index of every sheet

A to Z by title, with the code printed at the top left of each sheet, its section and the binder page it starts on (printed at the top of the page).

Sheet	Code	Sec.	Page
Appliance and Equipment Register	PR-03	01	16
Auction Bidding Limit Sheet	MB-12	05	96
Autumn and Winter Home Checklist	PR-09	01	26
Boiler Service Record	HS-01	02	37
Borehole and Private Supply Log	WP-08	04	74
Building Survey Checklist	MB-10	05	91
Change of Address Checklist	MB-11	05	101
Chimney Sweep and Stove Record	HS-08	02	45
Contractor and Tradesperson Log	PR-05	01	20
Emergency Contact Sheet	SC-03	03	69
Emergency Shut-Off Locations Sheet	PR-10	01	14
Filter Change Log	PR-07	01	28
Fire Extinguisher Check Log	SC-02	03	65
Garage and Loft Inventory	PR-12	01	33
Gas Appliance Safety Check Record	SC-09	03	67
Gas Furnace Service Record	HS-14	02	39
Gutter Cleaning Log	HS-09	02	57
Heating Oil Delivery and Usage Log	HS-12	02	44
Home Buying Document Checklist	MB-09	05	93
Home Contents Inventory for Insurance	PR-11	01	30
Home Maintenance Schedule	PR-01	01	21
Home Service History Register	PR-02	01	19
Hot Tub Drain and Refill Record	WP-07	04	88
Hot Tub Water Care Log	WP-02	04	86
House Viewing Comparison Sheet	MB-03	05	90
HVAC and Heat Pump Service Log	HS-03	02	40
Insurance Claim Evidence Log	PR-15	01	31
Ladder and Stepladder Inspection Record	SC-07	03	68
Meter Reading Log	MB-08	05	104
Month-by-Month Home Maintenance Checklist	PR-16	01	23
Moving House Checklist	MB-01	05	98
Moving Inventory and Box Log	MB-02	05	100
New Build Snagging List	MB-04	05	97
New Home Record Sheet	PR-06	01	12
Next of Kin and Emergency Details Card	SC-05	03	71
Paint and Decorating Record	PR-13	01	34
Pool Chemical and Maintenance Log	WP-01	04	76
Pool Closing and Winterising Checklist	WP-05	04	81
Pool Cover and Safety Check Record	WP-09	04	84
Pool Equipment Service Log	WP-06	04	83
Pool Opening Checklist	WP-04	04	79
Private Well Water Test Log	HS-05	02	51
Renovation Budget Tracker	MB-06	05	106
Renovation Quote Comparison	MB-05	05	105
Roof Inspection Record	HS-10	02	55
Septic Tank and Treatment Plant Log	HS-04	02	49
Smoke and CO Alarm Test Log	SC-01	03	60
Solar Panel and Inverter Log	HS-13	02	48
Spring and Summer Home Checklist	PR-08	01	24
Sump Pump Test Log	HS-07	02	54
Swim Spa and Plunge Pool Log	WP-14	04	85
Utility Change-Over Record	MB-07	05	103
Warranty and Receipt Register	PR-04	01	18
Water Heater Maintenance Log	HS-02	02	42
Water Softener Log	HS-06	02	53
Weekly Pool Maintenance Checklist	WP-03	04	78
Weekly Smoke Alarm Test Log	SC-12	03	62
Window and Blind Measurement Sheet	PR-14	01	35
Wood Burner and Fuel Log	HS-11	02	47

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HS-01

Upkeep Papers

Boiler Service Record

Keep the proof of annual servicing that boiler warranties commonly ask for, and an index of which engineer did what.

A running record of annual servicing for a gas, oil or LPG boiler. Most manufacturer warranties require proof of an annual service — this is that proof.

KEEP THE CERTIFICATE TOO

Keep the engineer's own paperwork as well. This sheet is an index of it, not a replacement for it. Note the engineer's registration number every time: it is the detail insurers and warranty departments ask for.

Property: The example house

Boiler make & model: Gas combi, model GC-30 (from the data plate)

Serial number: GC30-0000-0000 (data plate)

Installed: June 2019

Warranty ends: June 2026 (guarantee card)

Date	Engineer & reg. no.	Work / parts	Flue gas / readings	Next due	Cost
12 Oct 2023	R. Byrne, reg. no. on cert.	Service; certificate filed in the pocket	On the certificate		
3 Feb 2024	R. Byrne, reg. no. on cert.	Losing pressure: filling loop valve replaced	Not taken		
9 Dec 2024	R. Byrne, reg. no. on cert.	Service; condensate trap flushed	On the certificate		

EXAMPLE

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PR-03

Upkeep Papers

Appliance and Equipment Register

Collect the numbers you can never find when something breaks: model and serial numbers, install dates, and when the warranty runs out.

Every appliance and fixed machine in the property, with the numbers you can never find when you need them: model, serial, install date and warranty expiry.

DO THIS ONCE, PROPERLY

Photograph the rating plate of each appliance when you fill this in. Serial numbers are usually on a sticker behind, beneath or inside the door, and they become unreadable long before the appliance fails.

Property: The example house

Compiled by: The owners

Date: 5 Jan 2025

Appliance / item	Location	Make & model	Serial number	Installed	Warranty ends
Fridge-freezer	Kitchen	FF-180 (plate inside the door)	0000-1180	Mar 2021	Mar 2023
Washing machine	Utility room	WM-8 (label in the door)	0000-2291	Aug 2022	Aug 2025
Dishwasher	Kitchen	DW-60 (label on the door edge)	0000-3307	Nov 2023	Nov 2026
Gas combi boiler	Kitchen cupboard	GC-30 (data plate)	GC30-0000-0000	Jun 2019	Jun 2026
Electric oven	Kitchen	EO-2 (plate on the frame)	0000-4410	May 2018	Ended

EXAMPLE

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PR-04

Warranty and Receipt Register

Turn a failure into a claim instead of a bill, by knowing what is still covered before you call someone out.

A single index of what is still under warranty, so a failure becomes a claim instead of a bill.

HOW TO USE THIS SHEET

1. Log the item on the day it is installed, not when it breaks.
2. Note where the proof of purchase is. A warranty without a receipt is usually worthless.
3. Check whether the warranty requires annual servicing — many do, and an unserviced boiler or unregistered appliance can void the cover.

Item	Supplier / retailer	Purchased	Warranty length	Expires	Proof kept where	Service required?
Dishwasher DW-60	Local electrical shop	14 Nov 2023	Maker's, on the card	14 Nov 2026	Pocket divider	No
Gas combi boiler	The installer	2 Jun 2019	See the card	2 Jun 2026	Pocket divider	Yes: see card
Washing machine WM-8	Online order	9 Aug 2022	Maker's, on the card	9 Aug 2025	Email folder 'House'	No
Fridge-freezer FF-180	Local electrical shop	20 Mar 2021	Shop's, on the receipt	20 Mar 2023	Pocket divider	No
Front door lock	Locksmith	3 Apr 2024	On the invoice	3 Apr 2025	Pocket divider	No

EXAMPLE

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PR-10

Upkeep Papers

Emergency Shut-Off Locations Sheet

Make sure anyone in the household can turn off the water, gas or electricity quickly, including people who did not move in with the property.

Where the water, gas and electricity turn off, written down before you need it. Print it, fill it in, and put it on the inside of a cupboard door where anyone can find it.

> **TEST EACH ONE NOW, NOT LATER**
> Fill this in by walking to each one and operating it, so you know it moves and you know the route. A stopcock discovered during a leak is usually seized.

WATER

Mains stopcock — exactly where
Under the kitchen sink, behind the bin. Blue handle.

Which way to close
Clockwise

Does it turn freely?
Yes, tried on 5 Jan 2025

Internal stop valve / isolation
Under the stairs, on the pipe to the upstairs bathroom

Outside stop tap location
Footpath outside the front gate, small metal cover

GAS OR FUEL

Meter and emergency control valve — where
Meter box left of the front door; the lever is on the pipe beside the meter

Oil or LPG tank isolation — where
None: mains gas

Emergency number
On the label in the meter box

Supplier
Name on the latest bill

ELECTRICITY

Consumer unit / breaker panel — where
Under the stairs, top shelf, behind the door

Main switch labelled?
Yes, red tag added

Spare fuses / torch kept
Torch on a hook beside the panel

EXAMPLE

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HEATING AND OTHER

Boiler isolation switch
Switch on the wall, left of the boiler

Heating oil / pump isolation
Not fitted

Solar / battery isolation
Not fitted

Alarm system isolation
Panel in the hall; code with the owners

WHO TO CALL

Trade	Name / company	Number	Notes
Heating	R. Byrne	In phone: 'Boiler'	Boiler repair, Feb 2024
Electrician	Firm on the invoice	On the invoice	Fitted the outside light
Locksmith	Firm on the invoice	On the fridge list	New front door lock, Apr 2024

EXAMPLE

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PR-02 Upkeep Papers

Home Service History Register

Keep one continuous record of everything that has been serviced, repaired or replaced, so the history of the building exists in one place rather than in a drawer of loose invoices.

One running line per job, for the whole property. This is the sheet a buyer's surveyor, a warranty claim or an insurance adjuster will ask to see.

HOW TO USE THIS SHEET

1. Add a line every time work is done, however small. A missing year looks worse than a quiet one.
2. Write the trade name and the invoice number — that is what makes a line verifiable later.
3. Keep receipts in the same folder, in the same order as these lines.

Property address: The example house

Sheet: 1

Date	System / item	Work carried out	Company & invoice no.	Cost
dd/mm/yy				
12 Oct 2023	Boiler	Service; certificate filed	R. Byrne, inv. 2207	
3 Feb 2024	Boiler	Filling loop valve replaced	R. Byrne, inv. 2291	
3 Apr 2024	Front door	New lock, three keys	Locksmith, inv. 0418	
20 May 2024	Gutters	Two brackets replaced at the back	Roofer, inv. 88	
9 Sep 2024	Chimney	Swept; certificate filed	Sweep, receipt 315	
9 Dec 2024	Boiler	Service; condensate trap flushed	R. Byrne, inv. 2398	

EXAMPLE

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01

SECTION 01

The house file

WHAT GOES HERE

Purchase, insurance, warranties, appliances, contractors, keys and the shut-offs.

IN THIS SECTION 16 sheets, 24 pages

PR-06	New Home Record Sheet	12
PR-10	Emergency Shut-Off Locations Sheet	14
PR-03	Appliance and Equipment Register	16
PR-04	Warranty and Receipt Register	18
PR-02	Home Service History Register	19
PR-05	Contractor and Tradesperson Log	20
PR-01	Home Maintenance Schedule	21
PR-16	Month-by-Month Home Maintenance Checklist	23
PR-08	Spring and Summer Home Checklist	24
PR-09	Autumn and Winter Home Checklist	26
PR-07	Filter Change Log	28
PR-11	Home Contents Inventory for Insurance	30
PR-15	Insurance Claim Evidence Log	31
PR-12	Garage and Loft Inventory	33
PR-13	Paint and Decorating Record	34
PR-14	Window and Blind Measurement Sheet	35

Right-hand figure: the binder page the sheet starts on.

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PR-06

Upkeep Papers

New Home Record Sheet

Capture the things you need to know about a new property while you are still paying attention, rather than at two in the morning during a leak.

The things you need to find out in the first weeks in a property, and will regret not knowing at two in the morning.

START HERE
Fill in the shut-off section first, before anything else, and walk to each one so you know the route in the dark. Everything else on this sheet can wait; that part cannot.

SHUT-OFFS AND ISOLATION

walk to each one and note exactly where it is

Mains water stopcock

Internal stop valve

Gas meter and emergency control valve

Consumer unit / breaker panel

Heating system isolation

METERS AND SUPPLY

Electricity meter no.	Reading on arrival	Date
Gas meter no.	Reading on arrival	Date
Water meter no.	Reading on arrival	Date

Electricity supplier

Gas supplier

Water supplier

Broadband

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SYSTEMS IN THIS PROPERTY

tick what you have — it changes what needs servicing

- [ ] Gas boiler
- [ ] Oil boiler
- [ ] Heat pump
- [ ] Electric heating
- [ ] Solid fuel stove or open fire
- [ ] Solar thermal or PV
- [ ] Mains drainage
- [ ] Septic tank or treatment plant
- [ ] Mains water
- [ ] Private well
- [ ] Water softener
- [ ] Sump pump
- [ ] Air conditioning
- [ ] Mechanical ventilation

Anything unusual about this property

Notes and anything specific to yours

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PR-10

Upkeep Papers

Emergency Shut-Off Locations Sheet

Make sure anyone in the household can turn off the water, gas or electricity quickly, including people who did not move in with the property.

Where the water, gas and electricity turn off, written down before you need it. Print it, fill it in, and put it on the inside of a cupboard door where anyone can find it.

> **TEST EACH ONE NOW, NOT LATER**
> Fill this in by walking to each one and operating it, so you know it moves and you know the route. A stopcock discovered during a leak is usually seized.

WATER

Mains stopcock — exactly where

Which way to close

Does it turn freely?

Internal stop valve / isolation

Outside stop tap location

GAS OR FUEL

Meter and emergency control valve — where

Oil or LPG tank isolation — where

Emergency number

Supplier

ELECTRICITY

Consumer unit / breaker panel — where

Main switch labelled?

Spare fuses / torch kept

Free to print, copy and use — including at work. Not for resale.

HEATING AND OTHER

Boiler isolation switch

Heating oil / pump isolation

Solar / battery isolation

Alarm system isolation

WHO TO CALL

Trade	Name / company	Number	Notes

Free to print, copy and use — including at work. Not for resale.

PR-03

Upkeep Papers

Appliance and Equipment Register

Collect the numbers you can never find when something breaks: model and serial numbers, install dates, and when the warranty runs out.

Every appliance and fixed machine in the property, with the numbers you can never find when you need them: model, serial, install date and warranty expiry.

DO THIS ONCE, PROPERLY

Photograph the rating plate of each appliance when you fill this in. Serial numbers are usually on a sticker behind, beneath or inside the door, and they become unreadable long before the appliance fails.

Property _____ Compiled by _____ Date _____

Appliance / item	Location	Make & model	Serial number	Installed	Warranty ends

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Appliance and Equipment Register

Appliance / item	Location	Make & model	Serial number	Installed	Warranty ends

Where the manuals and receipts are kept

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

PR-04

Upkeep Papers

Warranty and Receipt Register

Turn a failure into a claim instead of a bill, by knowing what is still covered before you call someone out.

A single index of what is still under warranty, so a failure becomes a claim instead of a bill.

HOW TO USE THIS SHEET

1. Log the item on the day it is installed, not when it breaks.
2. Note where the proof of purchase is. A warranty without a receipt is usually worthless.
3. Check whether the warranty requires annual servicing — many do, and an unserviced boiler or unregistered appliance can void the cover.

Item	Supplier / retailer	Purchased	Warranty length	Expires	Proof kept where	Service required?

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PR-02

Upkeep Papers

Home Service History Register

Keep one continuous record of everything that has been serviced, repaired or replaced, so the history of the building exists in one place rather than in a drawer of loose invoices.

One running line per job, for the whole property. This is the sheet a buyer's surveyor, a warranty claim or an insurance adjuster will ask to see.

HOW TO USE THIS SHEET

1. Add a line every time work is done, however small. A missing year looks worse than a quiet one.
2. Write the trade name and the invoice number — that is what makes a line verifiable later.
3. Keep receipts in the same folder, in the same order as these lines.

Property address _____ Sheet _____

Date	System / item	Work carried out	Company & invoice no.	Cost
dd/mm/yy				

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PR-05

Upkeep Papers

Contractor and Tradesperson Log

Remember who did what, what it cost, and who was worth calling back — and have a dated record if a dispute ever starts.

Who came, what they did, what they charged, and whether you would have them back. Useful for the next job and essential if a dispute ever starts.

Property

Year

Date	Trade	Company & contact	Work done	Cost	Again?
		phone or email			Y / N

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PR-01

Upkeep Papers

Home Maintenance Schedule

Turn a vague intention to look after the house into a page you can tick off, so the jobs that only need doing once or twice a year actually get done.

A year of household jobs laid out month by month, with a box to date each one as it is done. Print one per year and keep it with your other property papers.

MAKE IT YOURS

Nothing here is a rule. Houses differ, and so do climates. Cross out what does not apply to yours and write in what does — an open fire, a septic tank, a sump pump, a well. The value is in having one page that says what you decided.

Property _____ Year _____

SPRING

date each job as you complete it

- [ ] Service the air conditioning or heat pump before it is needed _____
- [ ] Clear gutters and downpipes of winter debris _____
- [ ] Check the roof from the ground with binoculars — slipped or cracked tiles _____
- [ ] Inspect exterior paint, render and sealant around windows _____
- [ ] Test the lawn mower and outdoor machinery after storage _____
- [ ] Check outside taps and hoses for split pipes after frost _____

SUMMER

date each job as you complete it

- [ ] Clean or replace extractor and range hood filters _____
- [ ] Check the loft for signs of damp, daylight or pests _____
- [ ] Reseal decking, fencing and outdoor timber _____
- [ ] Vacuum the fridge and freezer condenser coils _____
- [ ] Flush the water heater and check the pressure relief valve _____
- [ ] Test the sump pump by pouring water into the pit _____

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AUTUMN date each job as you complete it

- [ ] Service the boiler or furnace before the heating season
- [ ] Sweep the chimney and check the flue
- [ ] Clear gutters again after leaf fall
- [ ] Bleed radiators and check system pressure
- [ ] Drain and insulate outside taps against frost
- [ ] Check window and door draught seals

WINTER date each job as you complete it

- [ ] Test every smoke and carbon monoxide alarm
- [ ] Check the extinguisher pressure gauge and the date
- [ ] Look for condensation, black mould and cold spots
- [ ] Check pipe lagging in the loft and unheated spaces
- [ ] Run seldom-used taps and toilets to keep traps sealed
- [ ] Check the loft hatch seal and insulation depth

Jobs specific to this property

Free to print, copy and use — including at work. Not for resale.

PR-16

Upkeep Papers

Month-by-Month Home Maintenance Checklist

Give the jobs that do not fit neatly into 'spring' or 'autumn' a home of their own, and carry anything unfinished straight into next month's row instead of losing it.

A home maintenance checklist broken into twelve monthly blocks rather than four seasons — for the jobs that are easiest to remember by the calendar month they fall in, and the ones that get missed between seasons.

YOURS TO FILL IN, NOT OURS TO PRESCRIBE

There is no universal list of what belongs in which month — that depends on your climate, your property and what you own. Use the blank row for each month to write in your own jobs, carry anything unfinished into the next row, and build your own list over the first year.

Property _____ Year _____

MONTH-BY-MONTH RECORD

Month	Jobs planned	Done	Carried to next month
write in the month		date	

Free to print, copy and use — including at work. Not for resale.

PR-08

Upkeep Papers

Spring and Summer Home Checklist

Work through the jobs that are easiest in warm, dry weather, while access is good and the heating is off.

The jobs worth doing as the weather warms, when access is easy and the heating is off. Tick and date as you go.

OUTSIDE

- [ ] Clear gutters, hoppers and downpipes; run water through to check flow
- [ ] Inspect the roof from the ground for slipped, cracked or missing tiles
- [ ] Check flashing around chimneys, valleys and roof lights
- [ ] Look for blocked or damaged air bricks and vents
- [ ] Check render, pointing and exterior paint for cracks
- [ ] Reseal or repaint exterior timber, decking and fencing
- [ ] Clear drains and gullies of leaves and silt
- [ ] Check outside taps and hoses for frost splits

COOLING AND AIR

- [ ] Service or clean the air conditioning or heat pump before the season
- [ ] Replace or wash ventilation and extractor filters
- [ ] Clear debris from around the outdoor condenser unit
- [ ] Check condensate drains are running freely

INSIDE

- [ ] Vacuum fridge and freezer condenser coils
- [ ] Flush the water heater and test the pressure relief valve
- [ ] Test the sump pump with a bucket of water

Free to print, copy and use — including at work. Not for resale.

- [ ] Check the loft for damp, daylight, droppings or disturbed insulation
- [ ] Descale shower heads and aerators

MACHINES

- [ ] Service outdoor machinery after winter storage — oil, plug, air filter, blade
- [ ] Fit fresh fuel; drain anything left standing over winter
- [ ] Check extension leads and outdoor sockets for damage

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

PR-09

Upkeep Papers

Autumn and Winter Home Checklist

Get ahead of the cold, so a frost or a storm does not turn into a burst pipe or a heating failure on the coldest night of the year.

The jobs that stop a cold snap becoming an expensive one. Best done before the first hard frost, not after it.

HEATING

- [ ] Service the boiler, furnace or heat pump before the heating season
- [ ] Bleed radiators and check system pressure
- [ ] Sweep the chimney and check the flue and cowl
- [ ] Check the oil or fuel level and order early
- [ ] Test the heating on a cold morning, not on the first cold night

WATER AND FROST

- [ ] Drain and isolate outside taps; disconnect and store hoses
- [ ] Check pipe lagging in the loft, garage and unheated spaces
- [ ] Insulate the cold water tank and any exposed pipework
- [ ] Locate the stopcock again and check it still turns
- [ ] Run rarely-used taps and flush unused toilets to keep traps sealed

OUTSIDE

- [ ] Clear gutters after the last of the leaves have fallen
- [ ] Clear drains and gullies
- [ ] Cut back branches that could come down on the roof or the supply cable
- [ ] Secure fence panels, gates and anything that can blow about
- [ ] Check the roof again after the first storm

Free to print, copy and use — including at work. Not for resale.

SAFETY

- [ ] Test every smoke and carbon monoxide alarm and note the date
- [ ] Check extinguisher pressure and service date
- [ ] Check torches, batteries and candles are where you can find them
- [ ] Check the loft hatch seal and insulation depth

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

PR-07

Upkeep Papers

Filter Change Log

Stop measuring a clogged filter in a dark loft.

Every filter in the building on one sheet — heating, ventilation, water, extraction — with the size written down so you can reorder without taking the old one out first.

THE POINT OF THIS SHEET

Write the filter size and part number the first time you change one. Measuring a clogged filter in a dark loft is the single most avoidable job in home maintenance.

Filter / location	Size or part no.	Change interval	Last changed	Next due	Changed	Next due
	write it down once					

Free to print, copy and use — including at work. Not for resale.

Filter Change Log

Filter / location	Size or part no.	Change interval	Last changed	Next due	Changed	Next due
	write it down once					

Where spares are kept

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

PR-11

Upkeep Papers

Home Contents Inventory for Insurance

List what you own before you need to, so a claim or a police report starts from a document rather than from trying to remember a burgled room.

Room by room, what you own, what it cost and where the proof is — written before you need it.

ASK YOUR INSURER WHAT THEY WILL ACCEPT

After a fire or a burglary, almost nobody can list what they owned. This is the sheet that answers for you. Insurers set their own requirements for what they will accept, so ask yours what they want before you rely on it — no sums, valuations or cover categories are printed here.

HOW TO USE THIS SHEET

1. Work one room at a time and photograph as you go — a photograph is worth more than a description.
2. Record serial numbers for anything that has one.
3. Note where the receipt or proof is kept, even if the answer is 'nowhere'.
4. Keep a copy somewhere other than the house: a relative, a workplace, cloud storage.

Household _____ Room _____ Compiled on _____ Sheet _____

Item	Make and model	Serial number	Bought from	When	Paid	Photo ref	Proof kept where

Copy of this sheet kept at _____ Updated on _____

Free to print, copy and use — including at work. Not for resale.

PR-15

Upkeep Papers

Insurance Claim Evidence Log

Keep a claim's own timeline and costs written down as they happen, so a stalled or disputed claim has a dated record behind it rather than a memory of what was promised.

A dated record of an insurance claim in progress — what happened, who you spoke to, what was agreed and what it cost — kept from the day it happened rather than reconstructed when the claim stalls.

THIS DOES NOT TELL YOU WHAT IS COVERED

This sheet does not say what your policy covers or how a claim is assessed — those are set by your policy wording and your insurer, and they differ. It exists so the dates, names and figures are all in one place when you are asked for them, rather than relying on memory.

Property _____ Incident date _____ Incident type _____

Insurer _____ Policy number _____ Claim reference _____

CONTACT LOG

every call, email or visit, in order

Date	Who — insurer, adjuster, contractor	Method	What was said or agreed	By whom

Free to print, copy and use — including at work. Not for resale.

DAMAGE AND COST

one row per item or area of damage

Date	Item / area	Description of damage	Photo / file ref.	Quoted / paid	Contractor	Receipt kept
			so a photo can b...			Y / N

Free to print, copy and use — including at work. Not for resale.

PR-12

Upkeep Papers

Garage and Loft Inventory

Know what is in the boxes without going up into the loft, by numbering the boxes and keeping the list on paper.

What is actually in the boxes in the loft, the garage and the shed, and which box it is in.

NUMBER THE BOXES, THEN LIST THEM

The point of this sheet is the box number. Numbered boxes with a list on paper turn twenty minutes of rummaging in a cold loft into ten seconds of reading.

Property _____ Area _____ Listed on _____ Listed by _____

Box or shelf	Where exactly	What is in it	Whose	Keep, sell or clear	Last opened

Anything here that should be insured or stored better _____

Reviewed _____

Free to print, copy and use — including at work. Not for resale.

PR-13

Upkeep Papers

Paint and Decorating Record

Record what went on which wall so a touch-up in three years is one trip to one shop instead of an afternoon of matching.

What colour, what finish, what brand and how much — so touching up in three years takes one trip.

WRITE DOWN THE FINISH AND THE CODE

The tin gets thrown away and the colour is forgotten. Written down with the finish, the batch and where it was bought, a repaint or a touch-up is a five-minute job instead of an afternoon of matching.

Property

Record started

Kept by

Room and surface	Colour name	Code or mix	Brand and range	Finish	Coats	Litres used	Bought from	Date	Enough left to touch up

Wallpaper, tiles and flooring — pattern, batch, where bought, and any spare kept

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PR-14

Upkeep Papers

Window and Blind Measurement Sheet

Measure every opening once, properly, and record all three measurements, so quotes and orders come from the same figures.

Every opening in the house measured properly — three widths, three drops, recess or face fit — written down once and used for every quote.

> **MEASURE AND RECORD; LET THE SUPPLIER DEDUCT**
> No allowances, deductions or fitting tolerances are printed here. Every supplier specifies their own, and applying somebody else's is how blinds arrive too narrow. Give suppliers your measured sizes and let them apply their deductions.

HOW TO USE THIS SHEET

1. Measure in millimetres. Feet and inches are where mistakes hide.
2. Measure each opening three times — top, middle and bottom for width, left, centre and right for the drop — and write all three down. Openings are rarely square.
3. Record the smallest of the three for a recess fit, and say which one you gave the supplier.
4. Say whether it is a recess or face fit, and note handles, tiles, pipes and anything that fouls.

Property _____ Measured by _____ Date _____ Units _____

Ref	Room	Window or door	Width top	Width mid	Width bottom	Drop left	Drop centre	Drop right	Recess or face	Size given to supplier	Obstructions

Quoted by _____ Quote reference _____ Ordered on _____

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02

SECTION 02

Systems and servicing

WHAT GOES HERE

Boiler, heat pump, oil, septic, well, solar and the rest of what keeps the house running.

IN THIS SECTION 14 sheets, 22 pages

HS-01	Boiler Service Record	37
HS-14	Gas Furnace Service Record	39
HS-03	HVAC and Heat Pump Service Log	40
HS-02	Water Heater Maintenance Log	42
HS-12	Heating Oil Delivery and Usage Log	44
HS-08	Chimney Sweep and Stove Record	45
HS-11	Wood Burner and Fuel Log	47
HS-13	Solar Panel and Inverter Log	48
HS-04	Septic Tank and Treatment Plant Log	49
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Right-hand figure: the binder page the sheet starts on.

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HS-01

Upkeep Papers

Boiler Service Record

Keep the proof of annual servicing that boiler warranties commonly ask for, and an index of which engineer did what.

A running record of annual servicing for a gas, oil or LPG boiler. Most manufacturer warranties require proof of an annual service — this is that proof.

KEEP THE CERTIFICATE TOO

Keep the engineer's own paperwork as well. This sheet is an index of it, not a replacement for it. Note the engineer's registration number every time: it is the detail insurers and warranty departments ask for.

Property

Boiler make & model

Serial number

Installed

Warranty ends

Date	Engineer & reg. no.	Work / parts	Flue gas / readings	Next due	Cost

Free to print, copy and use — including at work. Not for resale.

BETWEEN SERVICES

- [ ] System pressure checked and topped up
- [ ] Radiators bled
- [ ] Condensate trap and pipe checked for blockage or freezing
- [ ] Magnetic filter cleaned
- [ ] Flue terminal clear outside
- [ ] Carbon monoxide alarm tested

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

HS-14

Upkeep Papers

Gas Furnace Service Record

Give a forced-air gas furnace its own record, rather than folding it into a general heating-and-cooling log that was built around a different kind of system.

A service record for a gas forced-air furnace, kept separate from whole-house HVAC and cooling — filter size, igniter type and what each service actually checked, with the technician's own readings.

NO INTERVAL AND NO READING PRINTED HERE

Work on gas appliances is restricted to licensed or registered technicians in most places, and the scheme differs by country and state or province. This sheet does not set a service interval or a safe reading for anything — record your technician's own figures and follow your manufacturer's and local requirements.

Property _____ Furnace make & model _____ Serial no. _____

Fuel type _____ Install date _____ Warranty ends _____ Filter size _____

SERVICE RECORD

Date	Technician / company	Filter changed	Flue & venting checked	Technician's CO reading	Next due
		Y / N	Y / N	as read by the technician	

Free to print, copy and use — including at work. Not for resale.

HS-03

Upkeep Papers

HVAC and Heat Pump Service Log

Separate the annual professional service from the filter changes you do yourself, and keep both on one sheet.

Service and filter record for air conditioning, heat pumps and ducted heating. Filters are the job people skip and the one that costs them the compressor.

Property / zone

System make & model

Indoor unit serial

Outdoor unit serial

Installed

Filter size

Filter interval

Refrigerant type

PROFESSIONAL SERVICE

Date	Engineer / company	Work carried out	Readings	Next due

FILTER CHANGES AND OWNER CHECKS

Free to print, copy and use — including at work. Not for resale.

HVAC and Heat Pump Service Log

Date	Filter changed	Coils / condenser cleared	Condensate drain clear	Notes

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

HS-02

Upkeep Papers

Water Heater Maintenance Log

Track the two jobs that decide how long a water heater lasts: flushing out sediment and replacing the sacrificial anode before it is gone.

Servicing and inspection record for a hot water cylinder, tank or tankless heater. Sediment flushing and anode replacement are the two jobs that decide how long it lasts.

Location

Make & model

Serial number

Capacity

Installed

Type

Anode type / last replaced

SERVICE RECORD

Date	Flushed	Anode checked	T&P valve tested	Temp. set to	Work / parts	By

Free to print, copy and use — including at work. Not for resale.

WATCH FOR

- [ ] Rumbling or popping when heating — sediment build-up
- [ ] Rusty or discoloured hot water
- [ ] Damp, staining or corrosion at the base
- [ ] Weeping or dripping from the pressure relief discharge
- [ ] Water noticeably slower to reheat than it used to be

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

HS-12

Upkeep Papers

Heating Oil Delivery and Usage Log

Track what goes into the tank and what comes out of it, so a short delivery, a leak or a bad month shows up as a number instead of a suspicion.

Deliveries and usage for a heating oil or kerosene tank — what was delivered, what it cost, and what the tank read before and after, so you can see how much you actually get through.

HOW TO USE THIS SHEET

1. Read the tank gauge just before the tanker arrives and again once it has finished — those two numbers are what make the rest of the sheet useful.
2. Record the unit price as well as the total. It is the only way to compare one supplier or one month against another.
3. Work out the usage since the last delivery and write it in — a jump you cannot explain is worth investigating.

Property _____ Tank capacity _____ Tank type _____

Supplier / account no. _____ Gauge type _____ Where the tank is _____

Date	Supplier	Quantity	Unit price	Total cost	Before	After	Used since last	Notes
		litres / gallons			tank reading	tank reading		

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HS-08

Upkeep Papers

Chimney Sweep and Stove Record

Keep the certificate index that home insurers ask for after a chimney fire, and track flue condition over time.

Sweeping and inspection record for a chimney, flue, stove or open fire — the certificate index your insurer will ask for after a chimney fire.

THE CERTIFICATE IS THE EVIDENCE

Keep the sweep's certificate with this sheet. Many home insurance policies require evidence of regular sweeping for a solid fuel appliance, and the certificate is the evidence — this page just tells you where it is and when the next one is due.

Property

Appliance

Fuel

Stove make & model

Flue type

Installed

Date	Sweep / company	Flue condition	Certificate no.	Next due	Cost

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OWNER CHECKS

- [ ] Cowl and terminal clear — no nests, no debris
- [ ] Rope seals on the door intact
- [ ] Glass and baffle plate in good condition
- [ ] Carbon monoxide alarm in the room tested
- [ ] Fuel stored dry and seasoned

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

HS-11

Upkeep Papers

Wood Burner and Fuel Log

See what a heating season actually costs and which supplier and which fuel behaved best, rather than remembering it vaguely by March.

What fuel came in, from whom, how much of it there was and what it cost — plus room to say how it burned. One line per delivery, bag or load.

FUEL RULES ARE LOCAL — CHECK YOURS

Which fuels may be burned, and where, is set locally: rules differ by country, region and sometimes by street, and they change. Check what applies where you live — this sheet records what you bought and burned, it does not tell you what to burn. Sweeping, flue condition and certificates belong on the Chimney Sweep and Stove Record, which is a separate sheet.

Property _____ Appliance _____ Heating season _____

Stove make & model _____ Fuel store / where kept _____

Date	Fuel	Supplier	Quantity	Moisture %	Cost	How it burned / notes
	as sold to you		load, bag, crate	if measured		

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HS-13

Upkeep Papers

Solar Panel and Inverter Log

Notice a system quietly under-performing, by keeping generation figures next to the faults, shading and cleaning that explain them.

Generation and export readings for a solar PV system, alongside the inverter faults, cleaning, shading and servicing that explain why a month looks the way it does.

SAME DAY, EVERY MONTH

Read the meters on the same day each month and write the weather beside the number. A generation figure on its own says very little; the same month a year apart, next to a note about shading or a dirty array, says a great deal.

Property _____ System size _____ Commissioned _____

Panel make & model _____ Inverter make & model _____ Serial _____

Date	Generation	Since last	Export	Inverter fault / code	Cleaning / shading	Service and notes
	meter total, kWh	kWh	meter total, kWh	as displayed		

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HS-04

Upkeep Papers

Septic Tank and Treatment Plant Log

Answer the two questions that always follow a septic problem: when was it last emptied, and by whom.

Emptying, inspection and maintenance record for a septic tank or package treatment plant. The two questions after a failure are always when it was last emptied and by whom.

LOCAL RULES VARY

Rules for septic systems differ sharply between countries, states and counties — emptying intervals, discharge rules and registration are all local. Check what applies where you are; this sheet records what you did, it does not tell you what is required.

Property

System type

Tank capacity

Installed

Registration no. (if any)

Tank / access location

Soakaway / drainage field location

EMPTYING AND INSPECTION

Date	Emptied / inspected	Contractor	Sludge depth or condition	Waste transfer note	Next due

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Septic Tank and Treatment Plant Log

Date	Emptied / inspected	Contractor	Sludge depth or condition	Waste transfer note	Next due

WARNING SIGNS TO RECORD

- [ ] Slow drains or gurgling throughout the property
- [ ] Standing water or lush growth over the drainage field
- [ ] Smell near the tank or the field
- [ ] Alarm sounding on a treatment plant
- [ ] Backing up after heavy rain

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

HS-05

Upkeep Papers

Private Well Water Test Log

See how a private supply changes over years rather than judging it from one test, and keep the maintenance record alongside the results.

Test results for a private water supply, kept in one place over the years so you can see change rather than a single snapshot.

WE RECORD RESULTS — WE DO NOT SET LIMITS

Which tests to run, how often, and what counts as a safe result are set by your local authority or health department, and they differ by region. Record your results here and read them against the guidance that applies where you live.

Property _____ Source type _____ Depth / details _____

Treatment fitted _____ Installed _____

TEST RESULTS

Date	Laboratory	Coliforms / E. coli	Nitrate	pH	Hardness	Iron / Mn	Other

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Date	Laboratory	Coliforms / E. coli	Nitrate	pH	Hardness	Iron / Mn	Other

SYSTEM MAINTENANCE

Date	Work — shock chlorination, filter, pump, UV lamp	By

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HS-06

Upkeep Papers

Water Softener Log

Keep a softener actually working, rather than discovering months later that it ran out of salt and the limescale came back.

Salt, settings and servicing for a water softener — the appliance most often forgotten until the hardness comes back.

Make & model _____ Installed _____ Capacity _____

Incoming hardness _____ Set to _____ Salt type used _____

SALT AND SERVICE RECORD

Date	Salt added	Hardness tested	Regeneration checked	Service / parts	By

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HS-07

Upkeep Papers

Sump Pump Test Log

Prove the pump still works before the water arrives, including the backup that nobody ever tests.

A test record for a sump pump. A pump that has not been tested since last winter is not a pump, it is a hope.

HOW TO USE THIS SHEET

1. Pour a bucket of water into the pit until the float lifts. The pump should start, clear the pit and stop cleanly.
2. Check the discharge actually runs outside and is not frozen, blocked or draining back.
3. Test the backup pump and its battery separately — that is the one that matters.

Location

Pump make & model

Installed

Backup type

Battery fitted

Date	Pump ran	Pit cleared	Discharge clear	Backup tested	Battery	Notes

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HS-10

Upkeep Papers

Roof Inspection Record

Spot roof problems early and, more usefully, see what has changed since the last inspection.

A ground-level roof inspection you can do twice a year with a pair of binoculars, recorded so you can see what has changed since last time.

FROM THE GROUND

Do this from the ground. Roof work is genuinely dangerous and it is not the job this sheet is asking you to take on — you are looking for what needs a professional, not fixing it.

Property _____ Roof type / covering _____ Date _____

INSPECTION

- [ ] Slipped, cracked, broken or missing tiles or slates _____
- [ ] Ridge and hip tiles — mortar cracked or missing _____
- [ ] Flashing at chimneys, abutments and valleys _____
- [ ] Valleys clear of debris _____
- [ ] Moss growth heavy enough to block drainage _____
- [ ] Sagging in the roof line _____
- [ ] Fascia, soffit and bargeboard condition _____
- [ ] Roof lights and vents — seals and surrounds _____
- [ ] Chimney stack — pointing, leaning, pot condition _____
- [ ] Aerials, dishes and fixings secure _____
- [ ] Gutters and hoppers aligned and clear _____
- [ ] Signs of water tracking down external walls _____

LOFT CHECK FROM INSIDE

- [ ] Daylight visible through the roof covering _____
- [ ] Damp patches, staining or drips on the underside _____

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- [ ] Wet or compressed insulation
- [ ] Signs of birds, rodents or wasps

Action needed / who to call

Notes and anything specific to yours

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HS-09

Upkeep Papers

Gutter Cleaning Log

Keep gutters on a schedule instead of clearing them after the damp appears, and record faults you spotted but did not fix.

When the gutters were last cleared, by whom, and what was found. Blocked gutters cause more damp than leaking roofs do.

Property

Gutter type / height

Date	Areas cleared	Condition / faults found	Cleared by	Cost

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WHAT TO LOOK FOR WHILE YOU ARE UP THERE

- [ ] Sagging runs or loose brackets
- [ ] Joints leaking or dripping
- [ ] Downpipes blocked at the shoe or the gully
- [ ] Water tracking down the wall — staining below the gutter line
- [ ] Plants growing in the gutter — the last warning before a blockage
- [ ] Fascia or soffit soft to the touch

Notes and anything specific to yours

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03

SECTION 03

Safety at home

WHAT GOES HERE

Alarms, extinguishers, gas appliances, ladders and the emergency contacts.

IN THIS SECTION 7 sheets, 13 pages

SC-01	Smoke and CO Alarm Test Log	60
SC-12	Weekly Smoke Alarm Test Log	62
SC-02	Fire Extinguisher Check Log	65
SC-09	Gas Appliance Safety Check Record	67
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SC-05	Next of Kin and Emergency Details Card	71

Right-hand figure: the binder page the sheet starts on.

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SC-01

Upkeep Papers

Smoke and CO Alarm Test Log

Prove the alarms were tested, and catch the thing most people miss: alarms have an expiry date, and a working test button does not mean a working sensor.

A test record for every smoke and carbon monoxide alarm in the building — where each one is, when it was tested, and when the unit itself expires.

ALARMS EXPIRE

Alarms have an end-of-life date, usually printed on the back, and a working test button does not mean a working sensor. Write the replace-by date in the register below the first time you take each one down.

Property _____ Year _____

ALARM REGISTER

one line per alarm — fill in once

No.	Location	Type	Power	Installed	Replace by
		smoke / heat / CO	mains / battery		on the unit

MONTHLY TEST RECORD

tick each alarm that sounded

Free to print, copy and use — including at work. Not for resale.

Smoke and CO Alarm Test Log

Month	1	2	3	4	5	6	7	8	Tested by	Notes

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

SC-12

Upkeep Papers

Weekly Smoke Alarm Test Log

Give an interlinked or commercial alarm system tested every week its own year-long record, rather than squeezing a weekly habit into a sheet built for monthly testing.

A weekly test record for a smoke alarm system tested more often than once a month — common for interlinked and commercial systems in workplaces, shared housing and holiday lets — one tick a week across a full year.

FOR SYSTEMS TESTED WEEKLY, NOT MONTHLY

How often your alarms need testing is set by your manufacturer, your insurer, and in many workplaces and rented properties by local fire safety rules, and it differs by country and by alarm type. Use this sheet where weekly is what applies to you; for ordinary monthly domestic testing, use the Smoke and CO Alarm Test Log instead.

Property / premises _____

Alarm system covers _____

Year _____

WEEKLY TEST RECORD

Week starting	Tested	Tested by	Faults / notes
	Y / N		

Free to print, copy and use — including at work. Not for resale.

Weekly Smoke Alarm Test Log

Week starting	Tested	Tested by	Faults / notes
	Y / N		

Free to print, copy and use — including at work. Not for resale.

Weekly Smoke Alarm Test Log

Week starting	Tested	Tested by	Faults / notes
	Y / N		

Notes and anything specific to yours

Free to print, copy and use — including at work. Not for resale.

SC-02

Upkeep Papers

Fire Extinguisher Check Log

Keep a dated record of monthly visual checks, and separate them clearly from the professional servicing that premises usually also need.

A monthly visual check and service record for portable fire extinguishers, in a home, a workshop, a boat or a small premises.

VISUAL CHECK, NOT A FORMAL INSPECTION

This is an owner's visual check, not a formal inspection. Where extinguishers are part of a workplace or a let property, servicing by a competent person is usually required as well — check what applies to your premises and record it in the service table below.

Premises _____ Year _____

EXTINGUISHER REGISTER

No.	Location	Type	Size	Serial no.	Manufactured	Replace by
		type				

MONTHLY VISUAL CHECK

gauge in the green · pin and seal intact · hose clear · no damage or corrosion · clearly visible

Month	1	2	3	4	5	6	7	Checked by	Faults / action

Free to print, copy and use — including at work. Not for resale.

Fire Extinguisher Check Log

Month	1	2	3	4	5	6	7	Checked by	Faults / action

PROFESSIONAL SERVICE RECORD

Date	Company	Units serviced	Next due	Cert. no.

Free to print, copy and use — including at work. Not for resale.

SC-09

Upkeep Papers

Gas Appliance Safety Check Record

Keep your own index of who came to the gas appliances and when, so the right certificate can be found without going through a drawer of paperwork.

Which gas appliances were checked, by whom, under what registration number, and what they wrote down as having been found.

AN INDEX TO THEIR PAPERWORK

Work on gas appliances belongs to a registered engineer, and the paperwork they issue is the record that counts. This sheet is your own index of it: who came, when, to which appliance, and where their certificate or report is filed.

Property / site _____ Owner or manager _____ Started _____

APPLIANCE LIST

fill in once for each appliance

Appliance	Location	Make	Model	Serial or GC no.

VISIT RECORD

Date	Appliance	Engineer	Company	Registration no.	What was found	Document ref.	Filed where
		name		from their card	in their words	cert or report	

Free to print, copy and use — including at work. Not for resale.

SC-07

Upkeep Papers

Ladder and Stepladder Inspection Record

Make it clear what happened to a ladder after somebody looked at it, so a damaged one is recorded as withdrawn rather than quietly put back on the rack.

Each ladder identified once, then a record of every look-over: what was found, and what happened to the ladder as a result.

RECORD THE OUTCOME, NOT JUST THE LOOK

A ladder looked at and left in use is a different record from one taken out of use, and writing that down is what stops a damaged ladder going back on the rack.

Site / department _____ Register kept by _____ Started _____

LADDER REGISTER

fill in once for each ladder, and give it an ID

ID	Type	Make / model	Height or sections	Kept where	In service from
	step, extension...				

INSPECTION RECORD

Date	ID	Feet	Stiles	Rungs	Locks & stays	Label legible	Defects found	Outcome	By
		ok / fault	ok / fault	ok / fault	ok / fault	yes / no		in use / withdrawn	

Free to print, copy and use — including at work. Not for resale.

SC-03

Upkeep Papers

Emergency Contact Sheet

Put the numbers somebody needs in one place, so a house-sitter, a babysitter, a visiting relative or a tenant is not searching for them at the worst moment.

The numbers somebody needs when something has gone wrong and you are not there. Fill it in, print it, and put it where it can be read without looking for it.

FILL IN EVERY LINE, INCLUDING THE OBVIOUS ONES

Every field is blank, including the emergency services number, because it differs by country. Fill it in for where this sheet will hang. A number you have to look up is not an emergency number.

THIS PROPERTY

Address

What3words or nearest landmark

Emergency services number here

Non-emergency police

MEDICAL

Doctor

Number

Out of hours

Nearest hospital with an emergency department

Number

Dentist

Pharmacy

UTILITIES

Gas emergency

Electricity emergency

Water emergency

Heating engineer

Plumber

Electrician

PROPERTY

Landlord or agent

Number

Out of hours

Insurer

Policy number

Claims line

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Emergency Contact Sheet

Alarm company

Account or passcode held by

PEOPLE

Next of kin

Relationship

Number

Second contact

Relationship

Number

Trusted neighbour

Number

Holds a key

Pets in the house

Who will take them

SHUT-OFFS ARE ON THEIR OWN SHEET

Where the water, gas and electricity turn off is a separate sheet, because it needs space to describe a route rather than a number. Fill that one in as well and keep them together.

Free to print, copy and use — including at work. Not for resale.

SC-05

Upkeep Papers

Next of Kin and Emergency Details Card

Put one person's emergency contacts and practical details on a single page, in the order somebody should actually work through them.

Who to call, who decides, and what somebody arriving cold needs to know — on one page, for one person.

CONTACTS, NOT MEDICAL INSTRUCTIONS

No medical guidance of any kind is printed here, and none should be inferred. This is a contact card. What it records about health is what you choose to write on it, and anybody acting on it should be speaking to your doctor or the emergency services, not reading a printable.

HOW TO USE THIS SHEET

1. Fill in one card per person, not one per household.
2. Say plainly who has authority to make decisions, and whether that is recorded anywhere formally.
3. Keep it where somebody would look — with a carer, on a fridge, in a wallet — and think about who else can read it.
4. Date it and check it whenever a number changes.

THE PERSON

Full name _____ Known as _____ Date of birth _____

Address _____ Phone _____

NEXT OF KIN AND CONTACTS

in the order they should be tried

Order	Name	Relationship	Phone	Second phone	Email	Has a key

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WHO TO TELL, AND WHO DECIDES

Person with authority to make decisions

Recorded formally? Where

Doctor or practice

Phone

Preferred hospital, if any

THINGS SOMEBODY ARRIVING WOULD NEED TO KNOW

Access, pets, medication kept where, anything else

Completed by

Date

Review on

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04

SECTION 04

Water, pool and hot tub

WHAT GOES HERE

For houses that have them: leave the section out if yours does not.

An optional section: if your house has none of these, leave it out and keep the divider for later.

IN THIS SECTION 10 sheets, 15 pages

WP-08	Borehole and Private Supply Log	74
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Right-hand figure: the binder page the sheet starts on.

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WP-08

Upkeep Papers

Borehole and Private Supply Log

See what a private water supply is actually doing between samples, so a rising meter, a falling pressure or a lamp past its change date is caught from the log rather than from a dry tap.

A borehole, well or spring supply as a working system — what the meter and the pump are doing, how full the tank is, and whether the treatment is running — one row per check.

THE SUPPLY, NOT THE SAMPLE

Sample results belong on the Well Water Test Log. This sheet is the supply itself — volume drawn, pump, pressure, tank and treatment — because a run of meter readings shows a leak or a failing pump long before a test would.

Supply / property _____ Source ref _____ Pump make & model _____ Tank capacity _____ Treatment fitted _____

CONSUMABLES AND LAMP CHANGES

one row each time something is replaced

Date	Item replaced	Part / lamp ref	Hours or reading at change	Next due (supplier's figure)	By
	filter, UV lamp, dosing refill				

SUPPLY LOG

runs on to the back

Date	Meter reading	Used since last	Pump hours	Pressure gauge	Tank level	Treatment running	Taste / odour / colour	Initials
			if metered	as read		UV / filter / dosing	as found at the tap	

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Borehole and Private Supply Log

Date	Meter reading	Used since last	Pump hours	Pressure gauge	Tank level	Treatment running	Taste / odour / colour	Initials
			if metered	as read		UV / filter / dosing	as found at the tap	

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WP-01

Upkeep Papers

Pool Chemical and Maintenance Log

Track water chemistry as a trend, so you can correct a drift early instead of chasing a problem after it appears.

A daily and weekly water chemistry record for a swimming pool, so you can see a trend forming instead of reacting to a problem.

WE RECORD READINGS, WE DO NOT SET TARGETS

Target ranges depend on your pool's surface, sanitiser and local rules, and they are set by your test kit's instructions or your local authority — not by us. Record what you measure here and compare it against the guidance that applies to your pool.

Pool _____ Volume _____ Sanitiser type _____

Surface / liner _____ Filter type _____ Season _____

Date	Time	Free Cl	Total Cl	pH	Alk.	Cal. hard.	CYA	Temp	Chemicals added

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Pool Chemical and Maintenance Log

Date	Time	Free Cl	Total Cl	pH	Alk.	Cal. hard.	CYA	Temp	Chemicals added

WEEKLY PLANT MAINTENANCE

Date	Backwashed	Baskets emptied	Brushed / vacuumed	Filter pressure	Notes

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WP-03

Upkeep Papers

Weekly Pool Maintenance Checklist

Keep the physical weekly round going even when the chemistry looks fine, by giving it its own tick sheet instead of leaving it to memory.

The physical round, not the chemistry — skimming, brushing, vacuuming, backwashing and checking the level, one row per week for a season.

PAIRS WITH THE CHEMICAL LOG

This sheet is for the jobs you do with your hands, not the numbers you read off a test strip. Log the actual readings on the Pool Chemical and Maintenance Log; tick here once the physical round for the week is done.

Pool / property _____ Season or year _____ Pool type _____

WEEKLY ROUND

tick each job as it is done

Week beginning	Skim & baskets	Brush walls/floor	Vacuumed	Water tested	Backwash / filter	Level topped up	Done by	Notes

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WP-04

Upkeep Papers

Pool Opening Checklist

Bring a pool back into use in the right order, so a pump is not switched on dry and a leak is found before the pool is full rather than after.

Bringing an in-ground or above-ground pool back into use at the start of the season, worked through in order rather than remembered on the day.

YOUR FIRST READING, NOT OURS

No target chemistry figures are printed here. Take your first reading with your own test kit once the pool is running, and correct it using your kit's instructions or your pool supplier's guidance — this sheet is the order to work through, not the levels to aim for.

Pool / property _____ Date opened _____ Opened by _____

COVER AND SURROUNDS

- [ ] Remove standing water and debris from the cover before taking it off
- [ ] Clean and dry the cover before folding or storing it
- [ ] Clear leaves and debris from the pool surface and surrounds
- [ ] Check the deck, coping and surrounds for winter damage

EQUIPMENT START-UP

- [ ] Reconnect any hoses, plugs or fittings removed for winter
- [ ] Check pump, filter and heater for cracks or damage before running them
- [ ] Prime the pump and bleed air from the system before switching on
- [ ] Run the pump and check for leaks at every joint and fitting
- [ ] Clean or backwash the filter before it takes on a season's dirt

WATER

- [ ] Check and correct the water level for the skimmer
- [ ] Test the water once it has circulated, and record it on the chemical log

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- [ ] Vacuum any debris left on the floor before the first swim

SAFETY AND SURROUNDS

- [ ] Check gates, fencing and locks are in working order
- [ ] Check ladders, rails and diving equipment are secure
- [ ] Put the first aid kit and rescue equipment back in place

Notes — damage found, parts ordered, anything for next season

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WP-05

Upkeep Papers

Pool Closing and Winterising Checklist

Shut a pool down properly, catching the step that actually causes winter damage: water left standing in a pump, filter or pipe that then freezes.

Shutting an in-ground or above-ground pool down for the cold season, so nothing is left in a pipe or a pump to freeze and crack over winter.

YOUR CLIMATE DECIDES THE DETAIL

Winterising products, water levels and how far to drain the plumbing all depend on your climate, your pool type and your equipment — follow your manufacturer's own instructions and your local supplier's guidance. This sheet is the order to work through and the record that you did it.

Pool / property _____ Date closed _____ Closed by _____

WATER AND CHEMISTRY

- [ ] Balance the water and treat it for winter as your supplier recommends
- [ ] Lower the water level as your pool type and climate require
- [ ] Clean the pool thoroughly before the final treatment goes in

EQUIPMENT SHUTDOWN

- [ ] Backwash or clean the filter before storing it
- [ ] Drain the pump, filter, heater and any exposed pipework
- [ ] Blow out or drain lines that could hold standing water
- [ ] Remove drain plugs and store them where they will be found in spring
- [ ] Disconnect and store anything that should not stay out over winter

COVER AND FINAL CHECKS

- [ ] Fit an air pillow or equaliser if your cover system uses one
- [ ] Fit the winter cover and check it is secured all round
- [ ] Store chemicals somewhere frost-free and out of the weather

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Pool Closing and Winterising Checklist

- [ ] Note anything that needs fixing or replacing before next season

Notes — damage found, parts to buy before spring

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WP-06

Upkeep Papers

Pool Equipment Service Log

Track the equipment as machinery with its own service history, rather than mixing pump seals and heater faults in with water chemistry.

The pump, filter, heater and chlorinator as machines — identified once, then a running log of servicing, parts and repairs, separate from the water chemistry.

EQUIPMENT, NOT CHEMISTRY

This sheet tracks the equipment, not the water. Chemistry readings and backwashing belong on the Pool Chemical and Maintenance Log; this is where the pump gets a new seal or the heater gets serviced.

Pool / property _____ Pool volume _____ Sanitiser system _____

EQUIPMENT IDENTIFICATION

fill in once per item, from the rating plate

Item	Make & model	Serial no.	Installed	Runs at (hrs/day)
pump, filter, heater, chlorinator				if known

SERVICE AND REPAIR LOG

Date	Item	Work done	Parts used	Cost	Done by

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WP-09

Upkeep Papers

Pool Cover and Safety Check Record

Give the cover and the safety kit around a pool a record of their own, so a missing anchor or a gate that no longer self-closes is written down and acted on rather than noticed and forgotten.

The cover, its fixings and drive, and everything around the pool that keeps someone out of it or gets them out of it — gates, alarms, signage and rescue kit — checked in one pass.

YOUR INTERVAL, YOUR PASS MARK

How often this is done, and what counts as a pass, comes from your cover manufacturer, your insurer or the rules where you are — write that interval in the box, not here. Water chemistry is on the chemical log; this sheet is for the things that would be checked with the pool empty.

Pool / property _____

Cover type (safety, solar, slatted, winter) _____

Check interval (whose figure) _____

Rescue equipment kept here _____

Alarm or sensor fitted _____

Emergency contact posted at _____

CHECK RECORD

tick if sound, or write what was found

Date	Cover surface	Fixings / anchors	Reel, motor or track	Gates & latches	Alarms & signs	Rescue kit	Action needed	By
	tears, sag, pooling	count them all	runs freely	self-closing	working, legible	in place		

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WP-14

Upkeep Papers

Swim Spa and Plunge Pool Log

Keep a unit that is used hard in short bursts on a daily row, so the pattern between sessions, readings and cartridge cleans is visible rather than guessed.

A swim spa or plunge pool is neither a pool nor a hot tub — a few thousand litres, a current pump or a chiller, heavy use in short bursts. This log tracks the water, the sessions and the plant on one row.

YOUR RANGES, WRITTEN IN ONCE

No target readings are printed here. Your sanitiser and pH ranges, the water temperature you run at and how often the cartridge comes out are set by your manufacturer and the rules where you are — write them in the boxes so every row below has something to be read against.

Unit / property _____ Type (swim spa, cold or heated plunge) _____ Volume _____ Heater or chiller make _____

Sanitiser range (whose figure) _____ pH range (whose figure) _____ Running temp (whose figure) _____ Cartridge clean interval (whose) _____

DAILY LOG

Date	Temp as read	Sanitiser	pH	Sessions / users	Current pump or chiller	Cartridge	Water added	Cover & lock	Dosed / action	By
		as read	as read	since last row	ran, noise, flow	rinsed / new		on after use		

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WP-02

Upkeep Papers

Hot Tub Water Care Log

Keep on top of chemistry in a small volume of hot water, where readings move fast and drain-downs are on a schedule.

Water care and filter record for a hot tub or spa, where the small volume means chemistry moves fast and drain-downs matter.

READ YOUR OWN MANUFACTURER'S RANGES

Target ranges come from your tub manufacturer and your test strips, and differ between chlorine, bromine and salt systems. This sheet records what you measured and what you added; it does not tell you what the numbers should be.

Tub make & model _____ Volume _____ Sanitiser _____

Filter part no. _____ Last drained _____ Next drain due _____

Date	Sanitiser	pH	Alkalinity	Hardness	Temp	Chemicals added	By

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Hot Tub Water Care Log

Date	Sanitiser	pH	Alkalinity	Hardness	Temp	Chemicals added	By

FILTER AND DRAIN RECORD

Date	Filter rinsed	Filter deep-cleaned	Filter replaced	Drained & refilled	Notes

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WP-07

Upkeep Papers

Hot Tub Drain and Refill Record

See when a tub was actually last drained instead of guessing, and catch a tub that is being drained more often than it should need to be.

Every drain and refill for a hot tub or spa — the date, the reason, what the filter and shell looked like, and when the next one falls due.

YOUR MANUFACTURER'S INTERVAL, TRACKED HERE

How often a tub needs draining depends on its volume, how hard it is used and your manufacturer's own guidance — follow that, and use this sheet to see the pattern over time. Water chemistry between drains belongs on the Hot Tub Water Care Log.

Tub / property _____ Tub volume _____ Filter part no. _____

Date drained	Reason	Shell	Filter	Refilled	Treated	Next due	Notes
	scheduled, cloudy, od...	scale, staining, dam...	cleaned / replaced		shock / start-up ...		

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05

SECTION 05

Buying, moving and improving

WHAT GOES HERE

Viewings, surveys, moves, renovation and the meter readings in between.

IN THIS SECTION 12 sheets, 17 pages

MB-03	House Viewing Comparison Sheet	90
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Right-hand figure: the binder page the sheet starts on.

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MB-03

Upkeep Papers

House Viewing Comparison Sheet

Compare properties on the same points instead of on whichever one you saw last, and remember the things that are easy to ask about on the day and impossible to check afterwards.

Three properties side by side, with rows for the things you forget to compare once you have seen four in a day and they have merged into one.

WHAT YOU CAN SEE IN AN HOUR

A viewing is not a survey. This sheet compares what you can see and ask about on the day; it says nothing about whether a property is sound, and it does not replace an inspection by somebody qualified to carry one out.

What to compare	Property 1	Property 2	Property 3
Address or area			
Asking price			
Date viewed			
Type, age and size			
Aspect — which way it faces			
Parking and access			
Heating — type and age			
Glazing and draughts			
Damp — smell, staining, mould			
Broadband and mobile signal			
Noise — road, rail, neighbours			
Storage and loft space			
Outside space and boundaries			
Water pressure and hot water			
What needs doing			
Would you go back?			

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MB-10

Upkeep Papers

Building Survey Checklist

Look at a property properly on a second viewing, so the questions you put to a surveyor or a seller are the right ones.

What to look at on a second viewing, and what to photograph, before you pay anybody to survey it.

A LOOKING LIST, NOT A SURVEY

This is a looking list, not a survey. It prints no defect thresholds, diagnoses nothing and replaces no professional — its purpose is to make you look in the right places and photograph what you find, so the questions you ask a surveyor are the right ones. Anything that worries you needs somebody qualified.

Property	Viewing date	Weather	With

OUTSIDE

- [ ] Roof covering, ridge and verges — from the ground and from upstairs windows
- [ ] Chimneys, flashing and any pointing
- [ ] Gutters, downpipes and where the water actually goes
- [ ] Walls — cracks, bulges, repointing, render, damp staining
- [ ] Windows and doors — frames, seals, opening, condensation between panes
- [ ] Ground levels against the wall, and any air bricks
- [ ] Drainage, inspection covers, and where the drains run
- [ ] Boundaries, retaining walls, trees close to the building

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INSIDE

- [ ] Damp, staining or smell — behind furniture and in cupboards
- [ ] Ceilings and walls — cracks, bowing, previous repair
- [ ] Floors — level, bounce, gaps, what is underneath
- [ ] Windows from inside — rot, opening, locks, safety glass
- [ ] Loft — insulation, structure, daylight, water tanks, signs of vermin
- [ ] Heating and hot water — age, service records, radiators, controls
- [ ] Electrics — consumer unit, sockets, any certificate
- [ ] Plumbing — run the taps, flush, check under sinks and in the bath panel
- [ ] Ventilation and extraction in kitchen and bathrooms
- [ ] Anything altered — extensions, removed walls, loft conversions

QUESTIONS TO ASK, AND THINGS TO PHOTOGRAPH

What you saw	Where	Photo ref	Question for the seller or surveyor

Overall impression, written before you leave

Score out of ten

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MB-09

Upkeep Papers

Home Buying Document Checklist

Have a prompt list to work through with whoever is handling the transaction, so documents are found before they are asked for rather than afterwards.

The papers a buyer or a seller usually ends up gathering, as a prompt list to work through with whoever is handling the transaction.

REQUIREMENTS DIFFER — TAKE PROPER ADVICE

Conveyancing differs enormously between countries, and often between regions of the same country. Nothing here is a legal requirement and nothing here is legal advice — it is a general prompt list. Your solicitor, notary or conveyancer decides what is actually needed, and some of these will not apply to you at all.

Property	Buying or selling	Acting for you

WHO YOU ARE, AND THE MONEY

- [ ] Photo identification for every buyer or seller
- [ ] Proof of your current address
- [ ] Evidence of where the deposit came from
- [ ] Mortgage or loan paperwork, if there is one
- [ ] Paperwork for any gift towards the purchase

THE PROPERTY ITSELF

- [ ] Ownership or title documents, in whatever form applies
- [ ] Plans, boundaries and anything shared with a neighbour
- [ ] Rights of way, access and shared drives
- [ ] Planning or building approvals for past work
- [ ] Sign-off certificates for any building work
- [ ] Guarantees for damp, timber, roofing or structural work

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SYSTEMS AND SAFETY

- [ ] Heating installation and service records
- [ ] Electrical installation or inspection paperwork
- [ ] Certificates for gas, oil or solid fuel appliances
- [ ] Energy rating certificate, where one is required
- [ ] Septic tank or private drainage records
- [ ] Private water supply test results
- [ ] Solar, battery or heat pump paperwork and warranties

BILLS, CHARGES AND RUNNING COSTS

- [ ] Recent utility bills, with the meter numbers
- [ ] Local property charges or taxes on the property
- [ ] Service charges, ground rent or management fees
- [ ] Buildings insurance history and any claims made
- [ ] Broadband and phone contracts, and when they end

SHARED BUILDINGS AND MANAGED ESTATES

- [ ] Lease, share or ownership agreement, where one exists
- [ ] Managing agent or residents' association contacts
- [ ] Accounts, budgets and any planned major works
- [ ] Rules on pets, letting, parking and alterations

WHAT IS INCLUDED IN THE SALE

- [ ] List of fixtures and fittings included and excluded
- [ ] Appliance manuals, warranties and receipts
- [ ] Keys, fobs, remotes and alarm codes

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- [ ] Meter readings agreed on the day

Where each one is kept, and who has it

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MB-12

Upkeep Papers

Auction Bidding Limit Sheet

Set your limit in writing before bidding starts, with the premium and fees included, so the number you bid to is one you decided calmly.

The lots you want, the most you will pay for each, and what they actually went for — written before the room warms up.

WRITE THE LIMIT BEFORE YOU ARE IN THE ROOM

The whole value of this sheet is that the limit is written down before bidding starts. Work out the total cost including the buyer's premium, any taxes and getting the thing home, because that is what you actually pay — the hammer price never is.

HOW TO USE THIS SHEET

1. Read the terms and find the buyer's premium and any taxes before setting a single limit.
2. View the lots. Condition reports and photographs are written to sell.
3. Set the limit as the total you will pay, then work back to a hammer figure.
4. Write what it actually sold for, win or lose. After three auctions that column tells you whether your limits are realistic.

Auction house _____ Sale and date _____ Buyer's premium _____ Taxes and fees _____

Lot	Description	Viewed	Condition noted	Estimate	My total limit	Max hammer	Bid to	Sold for	Won

Total spent _____ Premium and fees _____ Collection by _____ Transport arranged _____

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MB-04

Upkeep Papers

New Build Snagging List

Keep every fault in a new build on one dated sheet, so the record of what was reported and when exists in your handwriting rather than in a builder's inbox.

Every fault found in a new build, from the first walk-round to sign-off, with the dates that turn a complaint into a record.

SCHEMES AND TIMESCALES DIFFER

What a developer has to put right, how long you have to report it and what any warranty covers differ by country and by scheme. This sheet records what you found and what happened next — check the terms that actually apply to your purchase, and report faults the way those terms require.

Plot / address _____ Developer _____ Handover date _____

Room	Item	What is wrong	Reported	Developer response	Fixed	Signed off
			date		date	initials

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MB-01

Upkeep Papers

Moving House Checklist

Work backwards from the moving date instead of remembering things in the wrong order, and see at a glance what has actually been done rather than what has been worried about.

Everything that has to happen before, during and after a move, grouped by how long is left. Print it as soon as a date is agreed and work down from the top.

TIMINGS DIFFER — ADJUST THEM

The countdown is a working order, not a rule. How much notice suppliers, schools and local registers need differs by country, and a rented move runs to a completely different clock from a purchase. Move the lines around to suit yours, and cross out what does not apply.

Moving from _____ Moving to _____

Moving date _____ Removal firm _____ Contact _____

ABOUT SIX WEEKS OUT

write the date as each one is done

- [ ] Confirm the date in writing with everyone involved _____
- [ ] Get quotes from removal firms and book one _____
- [ ] Check what your insurance covers while in transit _____
- [ ] Book time off for the move and the day after _____
- [ ] Tell schools and clubs, and ask for records _____
- [ ] Book storage if there is a gap between the dates _____

ABOUT TWO WEEKS OUT

write the date as each one is done

- [ ] Give notice to every utility and agree a final date _____
- [ ] Arrange broadband and phone at the new address _____
- [ ] Redirect post and list who else needs the address _____
- [ ] Update the address on insurance and banking _____
- [ ] Confirm parking, lift or access at both ends _____
- [ ] Order boxes, tape, labels and wrapping _____

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THE WEEK OF THE MOVE

write the date as each one is done

- [ ] Pack a first-night box and keep it out of the van
- [ ] Label every box with the room it is going to
- [ ] Defrost the freezer and drain the washing machine
- [ ] Dismantle whatever has to come apart
- [ ] Confirm the arrival time with the removal firm
- [ ] Set aside keys, documents and valuables to carry

MOVING DAY

write the date as each one is done

- [ ] Read and photograph every meter before you leave
- [ ] Walk every room, cupboard and the loft before locking up
- [ ] Hand over keys and note who took them and when
- [ ] Check the van is empty before it leaves
- [ ] Read the meters at the new property on arrival
- [ ] Find the stopcock, consumer unit and gas valve

THE FIRST WEEK IN

write the date as each one is done

- [ ] Check heating, hot water and every drain runs
- [ ] Test every smoke and carbon monoxide alarm
- [ ] Confirm the opening readings with the new suppliers
- [ ] Register with local services and update the address
- [ ] Change the locks if you do not know who holds keys
- [ ] Photograph and report anything damaged in transit

Notes and anything specific to yours

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MB-02

Upkeep Papers

Moving Inventory and Box Log

Know what is in every box and where it is meant to end up, so you can find the kettle on the first night and tell on the day whether anything is missing.

One line per box, written as you seal it. This is the sheet that turns unpacking from a search into a task, and the one that tells you on the day whether anything is missing.

> **NUMBER FIRST, PACK SECOND**
> Number the box before you fill it, and write that number on two sides and the top. A box stacked three deep with its label facing the wall may as well not be labelled at all. Keep this sheet with you rather than in the van.

Moving from _____ Moving to _____ Sheet _____

Box no.	Packed from	Goes to	What is in it	Fragile	Unpacked
	room	room	enough to find one thing	Y / N	date

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MB-11

Upkeep Papers

Change of Address Checklist

Work through everybody who holds your address, and track the gap between telling them and them acting on it.

Everybody who needs the new address, with the date you told them and the date it actually changed.

TOLD THEM, AND THEY DID IT

The second date is the one that matters. Telling an organisation and the organisation acting on it are different events, and the gap between them is where redirected post, missed renewals and bounced deliveries live.

Name _____ Old address _____ New address _____ Moving date _____

MONEY AND OFFICIAL

Who	Account or reference	How told	Date told	Confirmed changed	Notes

EVERYTHING ELSE

utilities, subscriptions, deliveries, clubs, and the ones people forget

- ☐ Employer and payroll
- ☐ Bank and card providers
- ☐ Pension provider

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Change of Address Checklist

- [ ] Tax authority
- [ ] Electoral register
- [ ] Driving licence
- [ ] Vehicle registration
- [ ] Vehicle insurance
- [ ] Home insurance
- [ ] Life and health insurance
- [ ] Doctor and dentist
- [ ] Optician
- [ ] Vet and pet microchip registry
- [ ] Schools and nurseries
- [ ] Council or local authority
- [ ] TV and broadband
- [ ] Mobile provider
- [ ] Energy suppliers
- [ ] Water supplier
- [ ] Loyalty and delivery accounts
- [ ] Online shops with saved addresses
- [ ] Clubs, gyms and memberships
- [ ] Charities and subscriptions
- [ ] Family, friends and anybody who posts you things

Post redirection ordered	From	Until	Reference

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MB-07

Upkeep Papers

Utility Change-Over Record

Close the old accounts and open the new ones with the readings and balances written down on the day, so a change-over dispute has a sheet of paper behind it.

Closing accounts at the old address and opening them at the new one, with the final readings and the closing balances written down on the day rather than argued about later.

PHOTOGRAPH EVERY METER

The final reading is the whole sheet. Take it yourself, photograph the meter face with the serial number in shot, and give it to the supplier the same day — a photograph settles a disputed bill and a number remembered a fortnight later does not.

Old address

New address

Detail	Electricity	Gas	Water	Broadband / phone
Old supplier				
Account number				
Final reading				
Date read				
Closing balance				
Refund or amount due				
New supplier				
New account number				
Opening reading				
Date switched				
Contract or tariff ends				

Other supplies — oil, LPG, media, waste collection

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MB-08

Upkeep Papers

Meter Reading Log

Build a running record of readings and the usage between them, so a bill is something you can check rather than something you have to accept.

A running record of electricity, gas and water readings, with the usage between them worked out — so a bill can be checked against something rather than accepted.

SAME DAY EACH MONTH

Read on the same date each month and the usage column becomes comparable month to month. Write the meter serial numbers in once: they are what identifies the meter if a reading is ever queried.

Property

Electricity meter no.

Gas meter no.

Water meter no.

Electricity supplier

Gas supplier

Water supplier

Date	Electricity	Used	Gas	Used	Water	Used	Notes
	reading	since last	reading	since last	reading	since last	

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MB-05

Upkeep Papers

Renovation Quote Comparison

See where three quotes actually differ, which is usually in what has been left out rather than in the number at the bottom.

Three quotes for the same job, set out so the differences are visible — including the ones that are differences in scope rather than in price.

PRICE IS THE LAST ROW FOR A REASON

Compare like with like, or the cheapest quote will simply be the one that leaves the most out. Ask every contractor to price the same written scope, and check any insurance or registration yourself rather than taking a copy at face value.

What to compare	Quote 1	Quote 2	Quote 3
Contractor or company			
Contact — phone and email			
What is included			
What is excluded			
Start date			
How long it will take			
Payment stages			
Written quote received?			
References seen?			
Insurance seen?			
Guarantee offered			
Is tax included?			
Price quoted			

Free to print, copy and use — including at work. Not for resale.

MB-06

Upkeep Papers

Renovation Budget Tracker

See the gap between what you planned to spend and what you have spent while there is still time to do something about it, rather than at the end.

What you planned to spend, what you were quoted, what you actually paid, and the gap between them — one line per element of the job.

A RECORD, NOT ADVICE

This sheet records numbers. It does not say what anything should cost, and it is not a view on what you can afford or how the work should be funded. Fill in your own figures and keep the invoices with it.

Project _____ Property _____ Started _____

Item or element	Budgeted	Quoted	Actual	Difference	Paid	Notes
				over / under	date	

Total budgeted _____ Total actual _____ Over or under _____

Free to print, copy and use — including at work. Not for resale.

06

SECTION 06

Certificates and receipts

WHAT GOES HERE

The paper behind the records: service certificates, test reports, receipts and guarantee cards.

File each one in the pocket on the back of this divider as it arrives, newest at the front, and note it on the sheet it belongs to. Bulky manuals are better in a clear punched pocket behind it.

IN THE POCKET

Date	Document	From	Sheet

06

Free from upkeeppapers.com. Print it, copy it, share it; please do not sell it.

CUT AWAY THIS STRIP

MAKE THE POCKET

1 Cut away the shaded strip, along the solid line.
2 Fold the flap back along the dashed line.
3 Tape its two short sides to the back of the divider.

Certificates and receipts

Newest at the front. Note each one on the sheet it belongs to.

Spine labels for 2-ring or 4-ring binders

Measure the spine pocket of your binder, cut out the widest strip that fits and trim it to length. Text reads top to bottom; turn the strip end over end if your shelf reads the other way.

Home Records Binder

Upkeep Papers · A4

Property / name

65 mm

Home Records Binder

Upkeep Papers · A4

Property / name

50 mm

Home Records Binder

Upkeep Papers · A4

Property / name

35 mm

Home Records Binder

Property / name

25 mm

Front label and small labels

Cut on the dashed lines. The front label is for a binder without a clear front pocket (with a pocket, slide the cover page in instead). The small labels are for a second binder, a box file or a shelf.

Upkeep Papers

A4 EDITION

Home Records Binder

The house file, assembled: the home record sheets in order, with dividers, an index and a set-up guide.

Name

Property

Started

Home Records Binder
Upkeep Papers

Contents / volume

Home Records Binder
Upkeep Papers

Contents / volume