

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	

SYSTEMS IN THIS PROPERTY tick what you have — it changes what needs servicing

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

Anything unusual about this property

Notes and anything specific to yours

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

HEATING AND OTHER

Boiler isolation switch

Heating oil / pump isolation

Solar / battery isolation

Alarm system isolation

WHO TO CALL

Trade	Name / company	Number	Notes

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

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

Where the manuals and receipts are kept

Notes and anything specific to yours

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?

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				

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

Property

Year

upkeeppapers.com

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

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

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	

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

- ☐ 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

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

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

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					

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

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

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

DAMAGE AND COST one row per item or area of damage

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

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

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