Home Maintenance Calendar & Property Log

Free working edition 0.1 | November 2, 2026 | David Tom Publishing

A practical guide for general US readers. Read the worked case, complete one sheet, and keep the supporting record with it. Examples and worksheet prompts are original DTP material; all example households and figures are fictional.

Print and write by hand, or use the editable Word file. The PDFs are not fillable. Copy a worksheet for another task or use a continuation sheet labeled with its code, question and date. Unknown is a valid answer when paired with a next step.

Keep completed records private. Use aliases and record locations instead of full account numbers, identification numbers, passwords or access codes. This is an organizer, not personalized financial, legal, lending, mechanical or repair advice.

Working edition: reader, physical-print, native Word and assistive-technology acceptance remain open. PDFs are untagged; no PDF/UA compliance or professional signoff is claimed. Print one sample page before a full run.

Build a calendar from records, not from guesses

Start with one system or responsibility in the home. Find the equipment manual, service agreement, inspection note, or other applicable source that explains what needs attention. Record its title and location. A calendar is a place to organize that information; it is not the authority for an interval or repair procedure.

When a schedule depends on conditions you have not checked, leave the date provisional. “Confirm the applicable interval in the manual” is a valid task. Choosing a date because an empty calendar looks unfinished is not a useful substitute.

Use a property nickname in shared drafts. Keep access information and detailed private records in their appropriate locations. The property log should point a helper to what they need without becoming an unnecessary collection of sensitive details.

Give each task a stable reference

A short reference such as HOME-014 connects the calendar, the service note, and the invoice. The reference should stay the same when the planned date moves. Otherwise a rescheduled task can look like a second task or disappear from the history.

For each record, distinguish scheduled, completed, follow-up required, and cancelled. These labels describe different events. A completed appointment may still leave follow-up work, and a cancelled visit should not become a completed maintenance record.

Write the basis for completion. “Provider visited” is less specific than “Provider's service note lists the work performed; an additional finding remains open.” Keep technical conclusions in the provider's words and identify their source.

Worked case: an invoice is not the whole story

A fictional homeowner, Casey, schedules a service visit under task HOME-014. The quoted charge is $140. The completed visit produces a $140 paid invoice and a written recommendation for a later assessment. Casey records the visit as completed, attaches the invoice reference, and creates a separate follow-up question linked to HOME-014.

The annual calendar now shows one completed visit and one unresolved follow-up. It does not show the additional assessment as performed. Casey also records who will request clarification and where the provider's note is stored. A substitute reading the log can see both the paid work and the unfinished question.

No repair interval or technical finding is supplied by this fictional example. Its lesson is the separation of appointment, evidence, payment, and follow-up.

Keep estimates out of the paid-cost total

Use separate fields for quoted, approved, and paid amounts. When a quote changes, retain the earlier quote with its date rather than replacing it without explanation. If the final amount covers several tasks, identify which invoice is shared so it is not counted once for every task.

A summary can show paid amounts for a chosen period, but it should say what is missing. A partial year of service records is not a complete ownership-cost history. The log helps the next review by showing its boundaries.

Prepare a useful handoff

Ask a helper to find the latest record for one system without your explanation. Watch where they hesitate. A missing invoice location or an unclear task title is a small defect worth fixing. A successful handoff means the helper can locate the record and understand its limits, not that the helper is qualified to perform a repair.

A small calendar that stays useful

Start HMG-01 with a single sourced task. Add another record only when you can identify its source or the question needed to find one. Review dates may move while the task reference stays the same.

For Casey's HMG-014 example, the quote and paid invoice are both $140. Only the paid $140 enters the paid-cost summary. Adding the quote as well would incorrectly produce $280. The recommended assessment has no completed-work entry and no invented cost.

Use HMG-03 for a chosen period. List each invoice once, even when it covers more than one task. If records are incomplete, label the summary partial and identify what to obtain.

HMG-01 — Source-based task calendar

Short notes are enough. Use a labeled continuation for longer answers; keep supporting records in their private location.

Property alias, system and stable task reference

Manual, service agreement or applicable record; location/version

Task described by that source; do not invent repair instructions

Due date or condition trigger; confirmed/provisional and basis

Responsible person; appointment status and confirmation

Actual outcome; completed/cancelled/follow-up required

Linked service log and next source-based review

HMG-02 — Service, payment and follow-up record

Short notes are enough. Use a labeled continuation for longer answers; keep supporting records in their private location.

Task reference, provider record and appointment date

Requested work and documented work performed, kept separate

Quoted amount/date; approved amount/date

Paid amount/date and unique invoice reference

Shared invoice task references; count the invoice only once in totals

Unresolved finding in provider's words; owner and next contact

Completion evidence and follow-up record reference

HMG-03 — Period summary and handoff

Short notes are enough. Use a labeled continuation for longer answers; keep supporting records in their private location.

Property alias; period covered and missing records

Unique paid invoice references and amounts; use continuation if needed

Paid total; exclude quotes, approvals and duplicate shared invoices

Open tasks and missing evidence; owner/date for each

Record a helper should find and its expected location

Observed result, hesitation and correction

Next review; partial history is not total ownership cost

Sources and keeping useful records

Editorial basis: the existing DTP Home and Life Transitions manuscript, expanded with original worksheets and arithmetic examples. This guide prescribes no repair interval, technical procedure, moving-contract deadline or jurisdiction-specific right.

Label amounts and dates estimated, confirmed or unknown. Retain the underlying document and its date. A completed worksheet does not verify the records entered into it.

Keep one current master and identify older copies. Before closing an item, record the evidence of completion; carry unresolved questions forward with an owner and next action. Download updates at davidtompublishing.com/home-life-guide-downloads/.