renewaltracker™

FREE CHECKLIST

Renewal Tracking Checklist

A practical checklist for keeping licenses, permits, certifications, contracts and policies from lapsing, whether you're setting up renewal tracking or checking the system you have.

What's inside

1. Build one complete list
2. Give every item an owner
3. Set reminders that leave enough time
4. When you renew
5. Review on a schedule
6. If something has already lapsed

Renewal Tracking Checklist

Use it to set up renewal tracking, or to check the system you have. Tick each box when it's true for your organization.

1. Build one complete list

- [ ] Gather renewals from every department, location and legal entity, not just the ones you remember.
- [ ] Include every type: licenses, permits, certifications, contracts, subscriptions, insurance policies, certificates of insurance, registrations, inspections, warranties, domains and SSL certificates.
- [ ] Record for each: what it is, who or what it belongs to, the issuer, the number, the expiration date, any earlier notice or action deadline, and the cost.
- [ ] Organize by location, department or client, so each team sees its own items.
- [ ] Attach or file the current license, certificate, policy or signed contract with each item.

2. Give every item an owner

- [ ] Name one owner who gets the renewal done, and a backup who covers absences.
- [ ] Name one central coordinator who sees every item, across all teams and locations.
- [ ] For employee credentials, make the employee responsible and copy their manager.

3. Set reminders that leave enough time

- [ ] For each item type, list every renewal step: inspections, classes, continuing education, quotes, approvals, signatures, payment.
- [ ] Set the first reminder before the earliest step can start, plus follow-ups as the date gets closer.
- [ ] For contracts that renew automatically, remind before the notice deadline, not the end date.
- [ ] Send reminders to the person who must act, and copy someone who will notice if nothing happens.

4. When you renew

- [ ] Confirm current requirements with the issuer: rules and fees change.
- [ ] Save the new document and the confirmation number with the item.
- [ ] Update the dates and cost, and make sure the next reminders are set.
- [ ] Send updated certificates to customers, landlords or agencies that require them.

5. Review on a schedule

- [ ] Monthly: look at everything due in the next 90 days and check in with each owner.
- [ ] When people join, leave or change roles: reassign their items the same day.
- [ ] When you open or close a location, sign a contract or buy a vehicle: add or retire its items.

- [ ] Yearly: clean up the list, check every owner and backup, and review reminder timing.

6. If something has already lapsed

- [ ] Contact the issuer right away: ask how to reinstate, whether you may keep operating, and what penalties apply.
- [ ] Stop any work the lapse affects until it is resolved, if the rules require it.
- [ ] Fix the cause: add the missing item, owner or reminder so it does not happen again.

Free to use and share within your organization. More guides at https://www.renewaltracker.com/guides. RenewalTracker keeps every renewal in one list, emails the right people before each deadline and stores the documents, since 2007.