

Before You Carry Retainer Hours

1. Read the actual terms

Confirm the original grant month, expiry rule, consumption order and any carry cap. Do not substitute a convenient spreadsheet rule for the agreement.

2. Keep grants separate

A 10-hour January grant and a 10-hour March grant may expire at different times. A single opening balance can erase that difference.

3. Use only completed periods

Collect approved usage for every month in order. A known zero is 0; a missing month is not 0. Do not close the month early if later work can still occur.

4. Separate four numbers

Allocated hours, uncovered usage, expired hours and the remaining bank answer different questions. Uncovered hours are not automatically billable.

5. Keep the monthly evidence

Preserve time-log totals, the agreement reference and a dated copy before changing old usage. Share a corrected summary only after reviewing downstream changes.

A small fictional example

January: 10 granted, 2 used. February: 10 granted, 3 used.

March: 10 granted, 4 used. With a 3-month life and oldest-first use,

1 January hour expires at March close; 20 hours remain in the bank.