READY TO INSPECT — FIELD CHECKLIST

Tankless water heater quarterly maintenance checklist

A quarterly tankless water heater round is short on purpose: it catches the wear items that fail between annual services. This checklist is sized for a tech with a phone. Every item says what to look at and the photo that proves the round happened. Work is commonly verified against IPC / UPC plumbing codes, manufacturer's published instructions. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The plumbing or maintenance tech on the quarterly mechanical round. When: Every quarter, since a tankless unit gives no warning before it starts short of temperature or throws a fault mid-shift.

Water side

- [ ] Unit locked out and water isolated before the screen is pulled
  Every circuit feeding the unit locked and tagged, cold and hot isolation valves shut and pressure bled at the drain port. Screen back in and valves open before locks come off, by whoever hung them.
  1 photo required

- [ ] Inlet filter screen removed, cleaned and reseated
  Cold inlet screen pulled, flushed of grit and scale, reinstalled and confirmed not restricting flow into the heat exchanger.
  2 photos required

- [ ] Occupants told before outlet temperature is tested or changed
  People using fixtures on this heater told before a test draw or a setpoint change, and the setpoint left at its recorded value unless the owner approved a change.
  No photo required

- [ ] Delivered temperature verified at a fixture
  Actual temperature measured at a representative fixture, compared against the setpoint, checked that a hot draw holds temperature and doesn't run cold-hot-cold.
  1 photo required

- [ ] Flow and temperature rise read against the rating
  At a steady full draw, flow and inlet and outlet temperatures read on the controller or measured, the rise compared with the manufacturer's flow chart and the last visit.
  1 photo required

- [ ] Unit and connections checked for leaks
  No weeping at inlet/outlet unions, isolation valves or the relief line, no mineral trails on the case pointing to a slow internal leak.
  1 photo required

Combustion and venting

- [ ] Venting and condensate drain checked on condensing units
  Vent run intact and sloped, terminal clear, condensate trap primed and neutralizer (where fitted) draining freely, not backing up into the unit.
  No photo required

- [ ] Burner flame and ignition observed
  Clean ignition on demand, steady flame with no rollout or sooting, unit modulating smoothly rather than hunting.
  No photo required

- [ ] Service clearances and air openings kept clear around the unit
  Nothing stored against the case or service side; on gas units the combustion air intake and any room air openings are free of lint, debris and nests.
  1 photo required

Supply and diagnostics

- [ ] Gas or electric supply confirmed adequate
  Gas pressure holding under full fire, or electrical connections tight and undamaged on electric units, no scorching at the supply terminals.
  1 photo required

- [ ] Error and fault history read off the controller
  Stored fault codes reviewed and logged, recurring ignition, flow or scale faults noted as a trend rather than cleared and forgotten.
  1 photo required

- [ ] Linked units checked sharing load in a cascade
  Where units run as a cascade or rack, each one fires as demand rises, the lead rotates as set, and no unit sits faulted while the others carry the load.
  No photo required

Return to service

- [ ] Unit left heating on demand with no active fault showing
  Locks confirmed off by the people who hung them, a hot draw starts the unit, and the display or status light shows no active fault when the tech leaves.
  1 photo required

- [ ] Quarterly readings added to the unit's service record
  Flow, temperature rise, fault codes and screen condition recorded against the unit tag so the descale interval can be judged from the trend.
  No photo required