READY TO INSPECT — FIELD CHECKLIST

Water softener annual maintenance checklist

The annual water softener service is the deep pass: the measurements, cleanings and tests a quarterly round doesn't reach. This checklist keeps the full service on record with the photos that make it defensible later. 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 water-treatment service tech on the annual service. When: Once a year. Stepping the valve through a full regeneration is what proves brine actually draws. The quarterly round only sees the timer clicking.

Isolation

- [ ] Downstream users told the building will run on hard water
  Owner and users of kitchens, laundry, boiler makeup or process water told before the bypass opens, since unsoftened water reaches them during the service.
  No photo required
- [ ] Programmed settings recorded before the valve is serviced
  Hardness, capacity, regeneration time and cycle durations photographed from the display so they can be restored if the board resets.
  1 photo required
- [ ] Bypass set, pressure bled and valve power isolated and tagged
  Bypass in bypass, head pressure bled, transformer unplugged or hard-wired feed locked, and tagged. Closed up before power and water return for the regeneration, isolated again before it reopens.
  1 photo required

Control valve service

- [ ] Valve seals, spacers and injector serviced
  Valve body opened per the manufacturer, seals, spacers and piston inspected, injector and screen cleared of the sediment that stalls a regen.
  2 photos required
- [ ] Drive gears, cam or piston drive and position switch checked
  Gears free of chipped teeth, cam or piston drive and position switch clean and dry, no water tracking into the motor housing from a seal that has been weeping.
  1 photo required
- [ ] Drain and brine flow controls cleaned and seated
  Drain line flow control and brine refill control removed, cleaned and reseated, none missing or swapped, since a wrong washer can backwash resin to drain.
  1 photo required

Resin and regeneration

- [ ] Resin bed condition and capacity checked
  Resin sampled for iron fouling or channeling, bed depth reasonable, softening capacity holding through a full cycle rather than breaking through early.
  2 photos required
- [ ] Brine draw and refill verified through a full regeneration
  Unit stepped through a manual regeneration, brine drawn down and the tank refilled to the correct level, each stage reaching the drain as it should.
  2 photos required
- [ ] Backwash and rinse flow watched at the drain air gap
  Air gap held above the receptor with the flow running, receptor taking the full flow without splash or backup, discharge free of resin beads.
  1 photo required
- [ ] Tap aerator or downstream strainer checked for resin beads
  Aerator or strainer opened and looked at, since beads downstream point to a cracked distributor or riser tube inside the resin tank.
  1 photo required

Brine tank

- [ ] Brine tank emptied, cleaned and grid plate checked
  Tank pumped down and cleaned of salt mush and sediment, grid or platform plate intact where fitted, refilled with clean salt.
  1 photo required

- [ ] Safety float lifted by hand to show the brine valve shuts
  Float assembly pulled from the brine well and cleaned, then lifted during refill to show the brine valve shuts off before the tank can overflow.
  1 photo required

Return to service

- [ ] Settings confirmed, bypass returned to service and tag removed
  Program checked against the recorded settings with the clock set, bypass back in service, tag removed by whoever hung it and users told soft water is back.
  1 photo required

- [ ] Post-service hardness compared with last year's result
  Treated water tested at a tap once the unit is back online, the proof the rebuild restored softening, against the design or site baseline and last year's reading.
  1 photo required

- [ ] Annual service findings logged to the softener record
  Seal, injector and resin findings, flow control condition, hardness results and salt use entered so next year's service compares against them.
  No photo required