READY TO INSPECT — FIELD CHECKLIST

Water softener quarterly maintenance checklist

A quarterly water softener 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 water-treatment tech on the quarterly round. When: Every quarter, tightened up on a high-draw building where the salt runs down fast and bridging forms between visits.

Brine tank

- [ ] Salt level checked and tank probed for bridging
  Salt kept above the water line, tank probed with a handle to break any salt bridge or mushing at the bottom that would leave the unit regenerating on plain water.
  2 photos required
- [ ] Brine well and safety float checked
  Brine well clear, float and air check moving freely, no salt slurry fouling the safety float.
  1 photo required
- [ ] Salt on hand matched to the manufacturer's specified type
  Bag label read and matched to the salt the manufacturer calls for, pellets, crystals or a low-iron grade, with no salt form the manufacturer excludes fouling the tank.
  1 photo required
- [ ] Brine tank lid on and tank shell sound
  Lid seated to keep dust and debris out, shell free of cracks or bulging, no salt crust weeping at the base or around the overflow fitting.
  1 photo required
- [ ] Brine line between tank and valve checked
  Brine tubing seated at both fittings with no kink, crack or air leak that would stop the draw, and no salt crust packed at the connections.
  1 photo required

Output and cycle

- [ ] Softness verified with a hardness test at a tap
  Treated water drawn at a downstream tap and run through a hardness test, compared against the incoming hardness to confirm the unit is actually softening.
  2 photos required
- [ ] Regeneration timer or meter confirmed set
  Clock time and regen schedule correct on a timer head, or gallons-remaining advancing on a metered head, not stuck and not regenerating mid-shift.
  1 photo required
- [ ] Programmed hardness compared with the design or site baseline
  Hardness or capacity value in the controller read and compared with the design basis or the site's baseline raw water hardness, a mismatch reported rather than a new value guessed at.
  1 photo required
- [ ] Control valve power and display checked
  Valve power secure: plug-in transformer on an unswitched outlet or hard-wired feed with its cover on, display lit with no error code, low battery or service alert showing.
  1 photo required
- [ ] Tank alternation checked on twin or duplex units
  Where two resin tanks alternate, the in-service indicator changes as the meter or schedule calls for, not one tank carrying the whole load.
  No photo required

Bypass and leaks

- [ ] Bypass position and control head checked for leaks
  Bypass in the service position, no weeping at the valve body or drain line, drain and overflow lines routed to an air gap.
  1 photo required

- [ ] Resin tank upright with its shell and base dry
  Mineral tank plumb and stable, shell free of cracks or bulging, no weeping at the distributor seal under the head and the floor around the unit dry.
  1 photo required

Record

- [ ] Salt added and usage since the last visit logged
  Bags added and drawdown since the last round logged, a sudden jump or drop in salt use flagged as a sign of a stuck regeneration, a leak or a bridge.
  No photo required

- [ ] Hardness results and settings logged to the softener record
  Incoming and treated hardness, programmed values, bypass position and any fault entered against the unit tag so the next round compares against them.
  No photo required