

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

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

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