

Water Heater Maintenance Checklist: Tank and Tankless Annual Service

Blank copy

Unit and service date

SERVICE DATE

PROPERTY ADDRESS

HEATER LOCATION

FUEL

HEATER TYPE

BRAND AND MODEL

SERIAL NUMBER

CAPACITY OR FLOW

THERMOSTAT SETTING (??F)

LAST SERVICE DATE

SERVICED BY

Storage tank tasks

Item	Done	Skip	N/A	Notes
Power or gas off before draining	☐	☐	☐	
Flush or drain sediment until water runs clear	☐	☐	☐	
Drain valve opens, closes, and does not leak	☐	☐	☐	
Anode rod inspected or replaced	☐	☐	☐	
T&P valve lift test or visual check	☐	☐	☐	
Tank and pipe insulation checked	☐	☐	☐	
Drain pan and pan drain clear	☐	☐	☐	
Heat pump air filter cleaned	☐	☐	☐	
Heat pump condensate line clear	☐	☐	☐	
Tank refilled before restoring power	☐	☐	☐	

Tankless tasks

Item	Done	Skip	N/A	Notes
Inlet water filter cleaned	☐	☐	☐	
Heat exchanger descaled or flushed	☐	☐	☐	
Fresh-water rinse after descale	☐	☐	☐	
Isolation valves used and restored	☐	☐	☐	
Condensate trap cleaned	☐	☐	☐	

Condensate drain and freeze protection	☐	☐	☐	_____
Freeze protection powered or unit drained	☐	☐	☐	_____
External pipes insulated against freeze	☐	☐	☐	_____
Intake air filter cleaned	☐	☐	☐	_____
Pressure relief valve not plugged	☐	☐	☐	_____

Safety, combustion, and shutoffs

Item	Done	Skip	N/A	Notes
Combustibles kept clear of the heater	☐	☐	☐	_____
Combustion air openings unobstructed	☐	☐	☐	_____
Vent, flue, or draft hood checked	☐	☐	☐	_____
Fuel shutoff accessible at the heater	☐	☐	☐	_____
Electric disconnect or labeled breaker	☐	☐	☐	_____
Cold-water shutoff at the heater	☐	☐	☐	_____
Expansion tank present on a closed system	☐	☐	☐	_____
Expansion tank pre-charge checked	☐	☐	☐	_____
Relief discharge pipe open and correct	☐	☐	☐	_____
No leaks at tank, fittings, valves, or pan	☐	☐	☐	_____
Faucet temperature checked against setpoint	☐	☐	☐	_____

Service log and sign-off

SERVICE NOTES

PARTS REPLACED

ANODE ACTION

EXPANSION TANK PRE-CHARGE (PSI)

NEXT SERVICE DUE

SERVICE RESULT

SIGNATURE

Reference only. Verify against local codes, a licensed inspector or a qualified contractor.