Water Softener Maintenance Checklist: Salt, Resin, and Bypass

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Softener and service date

SERVICE DATE

PROPERTY ADDRESS

SOFTENER LOCATION

SYSTEM TYPE

REGENERATION CONTROL

WATER SOURCE

BRAND AND MODEL

SALT TYPE IN THE TANK

LAST SALT REFILL

LAST BRINE-TANK CLEAN

LAST PROFESSIONAL SERVICE

LAST REGENERATION

INCOMING HARDNESS (GPG)

SOFTENED HARDNESS THIS VISIT (GPG)

SALT LEVEL OBSERVED

SERVICED BY

Salt and brine tank

Item	Done	Skip	N/A	Notes
Salt level checked and refilled if low	☐	☐	☐	
Salt type matches the OEM, lid back on	☐	☐	☐	
Salt bridge checked and broken if present	☐	☐	☐	
No salt mush or sludge blocking the bottom	☐	☐	☐	
Brinewell cover on and brine tank covered	☐	☐	☐	
Brine tank cleaned if due, while salt is low	☐	☐	☐	

Bypass, leaks, and drain

Item	Done	Skip	N/A	Notes
Bypass set to Service, not left in Bypass	☐	☐	☐	
Inlet and outlet fittings, clips, or unions seated	☐	☐	☐	
No leaks at valve, bypass, brine line, or tank	☐	☐	☐	
Brine line fully seated, hand tight, no air leak	☐	☐	☐	
Valve drain hose open, not pinched, not tied to overflow	☐	☐	☐	

Brine-tank overflow hose separate, not elevated	☐	☐	☐	
Transformer plugged in, outlet not on a wall switch	☐	☐	☐	
Not in a freeze location; outdoor bibs stay hard if piped that way	☐	☐	☐	

Control, hardness, and regeneration

Item	Done	Skip	N/A	Notes
Time of day correct after any power loss	☐	☐	☐	
Hardness setting matches a current test or utility report	☐	☐	☐	
Iron compensation or extra backwash set only if this OEM uses it	☐	☐	☐	
Regeneration is demand-initiated or only as often as needed	☐	☐	☐	
Vacation, bypass, or unplug used if the house will sit empty	☐	☐	☐	
Softened water hardness tested or scheduled	☐	☐	☐	
Manual recharge started if salt ran out or a bridge was broken	☐	☐	☐	

Resin, injector, and sanitizing

Item	Done	Skip	N/A	Notes
Resin cleaner used only if the OEM or iron condition calls for it	☐	☐	☐	
Nozzle and venturi, or injector and screen, cleaned if brine will not draw	☐	☐	☐	
Sanitized after install, long idle, or boil-water, only per OEM	☐	☐	☐	
Cabinet wiped with mild soap only, nothing stacked on top	☐	☐	☐	
Left off after a boil-water advisory until the supply is potable again	☐	☐	☐	
Error or low-salt display recorded, cause fixed before you clear it	☐	☐	☐	

Service log and sign-off

SERVICE NOTES

SALT ADDED THIS VISIT (POUNDS)

CLEANER, BLEACH, OR PARTS USED

NEXT SALT CHECK DUE

NEXT BRINE-TANK CLEAN DUE

NEXT PROFESSIONAL SERVICE DUE

SERVICE RESULT

SIGNATURE

TIME SIGNED

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