Water Heater Preventive Maintenance Task Checklist

For Property & Facility Managers Overseeing Commercial & Multifamily Service in Southern California

How to Use This Checklist
Use this checklist to verify that your plumbing service vendor has completed all required maintenance tasks during each service visit. Review it before the visit to confirm scope, during the visit to ask informed questions, and after the visit to confirm documentation was provided. Retain completed checklists as your service record for warranty, compliance, and liability purposes.

California notes: Hard water in Southern CA region accelerates sediment accumulation and anode rod depletion faster than standard national intervals suggest. Semi-annual flushing - not annual - is the appropriate standard for most commercial and multifamily applications here. California health codes and Title 24 energy compliance require documented hot water temperature maintenance in restaurants, hotels, schools, healthcare facilities, and multifamily buildings. Retain completed checklists and service logs as your maintenance record - required for warranty claims, compliance inspections, and protection against tenant habitability disputes.

PROPERTY AND EQUIPMENT INFORMATION

Field	Details
Property Name / Address	
Unit ID or Location	
Manufacturer and Model	
Serial Number	
Fuel Type	☐ Natural Gas ☐ Propane ☐ Electric
Tank Capacity (gallons)	
Year Installed	
Servicing Company and CA License #	

BEFORE THE VISIT - CONFIRM YOUR VENDOR'S SCOPE INCLUDES:

☐ Sediment flush until water runs clear
☐ Bacteria flush using bleach or approved disinfection solution
☐ T&P valve test with result documented
☐ Anode rod inspection - with replacement if more than 6 inches of core wire is visible
☐ Burner assembly inspection and flame check *(gas units)*
☐ Thermocouple or thermopile inspection *(gas units)*
☐ Flue and combustion air intake inspection and cleaning *(gas units)*
☐ Heating element and thermostat inspection *(electric units)*
☐ Full leak and connection inspection
☐ Written service report with component-level findings - not just a completion notice
If the vendor cannot confirm these items are in scope before the visit, clarify in writing before service begins.

SEMI-ANNUAL VERIFICATION CHECKLIST *Use at every service visit - typically spring and fall*

PRE-SERVICE

☐ Vendor conducted visual inspection of tank exterior, connections, and base before beginning service
☐ No active leaks, rust staining, or standing water identified - or findings were noted and reported
☐ Combustion air supply to mechanical space confirmed unobstructed *(gas units)*
Pre-service findings reported by vendor: _____

SEDIMENT FLUSH

☐ Burner set to pilot or power turned off before draining
☐ Tank drained via drain valve with hose directed to appropriate discharge location
☐ Water flushed until confirmed running clear - multiple cycles performed if heavily scaled
☐ Drain valve inspected and confirmed functioning - or flagged for replacement
Sediment level reported: ☐ Light ☐ Moderate ☐ Heavy *Drain valve condition:* ☐ Good ☐ Requires replacement

BACTERIA FLUSH

☐ Bacteria flush performed after sediment flush using bleach or approved disinfection solution
☐ All hot water fixtures confirmed positive for chlorine before disinfection dwell period
☐ System flushed clear of chlorine before returning to service
Bacteria flush completed: ☐ Yes ☐ No *(note reason if no)*

T&P VALVE TEST

☐ Discharge pipe confirmed directed downward to safe drainage location before testing
☐ Valve lever lifted and water confirmed discharged through overflow pipe
☐ Valve reseated completely when lever released - no continuous dripping
☐ If valve failed test: replacement scheduled or completed
T&P valve result: ☐ Pass ☐ Fail - requires replacement *Discharge pipe:* ☐ Correct routing and intact ☐ Requires attention

LEAK AND CONNECTION INSPECTION

☐ Cold water inlet connection inspected - no drips or mineral buildup noted
☐ Hot water outlet connection inspected - no drips or mineral buildup noted
☐ Gas supply line and shutoff valve inspected - no leakage *(gas units)*
☐ All accessible connections and fittings inspected
☐ Tank base inspected - no moisture, rust staining, or seepage
Leaks or concerns: ☐ None identified ☐ Issues found - describe: _____

COMBUSTION AIR AND VENTING *(Gas units only)*

☐ Combustion air intake vents cleaned and confirmed unobstructed
☐ Flue pipe connections confirmed seated with no gaps or disconnection
☐ No evidence of flue gas spillage - no soot staining around draft hood or flue collar
Combustion air and venting: ☐ Clear and intact ☐ Requires attention: _____

POST-FLUSH RESTART

☐ Tank confirmed fully refilled before burner relight or power restored
☐ Unit confirmed firing and heating cycle initiated
☐ Thermostat setting confirmed - 130°F–140°F at heater
☐ All connections rechecked for leaks after restart

ANNUAL VERIFICATION CHECKLIST *Complete once per year - combine with one semi-annual visit*

ANODE ROD INSPECTION AND REPLACEMENT

☐ Anode rod removed and physically inspected - not assumed good based on age
☐ Condition assessed against replacement standard:

Condition	Action Required
Less than 6 inches of core wire visible	Return to service - document condition
More than 6 inches of core wire visible	Replace - confirm completed
Fully depleted to core wire	Replace immediately
Heavy calcium coating	Replace - hard water accelerating depletion

☐ If replaced: rod material documented and appropriate for local water conditions
Anode rod condition: ☐ Good - returned to service ☐ Replaced *Approximate rod remaining if not replaced:* _____% *Rod material if replaced:* ☐ Magnesium ☐ Aluminum

BURNER AND COMBUSTION SYSTEM *(Gas units only)*

☐ Burner assembly inspected for debris, corrosion, and clogged ports
☐ Burner fired and flame observed - blue and even across all ports
☐ Yellow, orange, or uneven flame reported and addressed
☐ Thermocouple or thermopile inspected and confirmed functional
☐ Gas valve inspected - no corrosion or damage noted
☐ Pilot assembly confirmed steady and appropriately sized
Burner condition: ☐ Normal ☐ Cleaned ☐ Requires further service *Thermocouple:* ☐ Good ☐ Replaced ☐ Flagged

HEATING ELEMENT INSPECTION *(Electric units only)*

☐ Upper and lower heating element connections inspected - no corrosion or scale buildup
☐ Thermostat connections and settings verified
Element condition: ☐ Good ☐ Requires attention

EXPANSION TANK *(If installed)*

☐ Pre-charge pressure checked and confirmed matching system cold water pressure
☐ No water present at Schrader valve - if water present, tank is waterlogged and requires replacement
Expansion tank: ☐ Good ☐ Waterlogged - requires replacement ☐ Not installed

FINAL ANNUAL ITEMS

☐ Thermostat setpoint confirmed at 130°F–140°F
☐ For restaurant applications: output temperature confirmed adequate for 180°F dishwasher final rinse requirement
☐ Air intake vents cleaned *(gas units)*
☐ Tank and pipe insulation confirmed intact
☐ Prior service records reviewed - recurring issues or flagged components noted

FAILURE SIGNS QUICK REFERENCE

If any of the following are observed between service visits, contact your plumbing service vendor promptly:

Sign	Most Likely Cause	Action
Rumbling or banging during heating	Sediment accumulation	Schedule flush - do not defer
Rusty or discolored hot water	Anode rod depletion / active corrosion	Professional evaluation - may require replacement
Insufficient hot water volume	Sediment / failing thermostat / burner issue	Service visit required
Water pooling at base of tank	Possible tank wall failure	Call immediately - not repairable
T&P valve dripping continuously	Overpressure or failed valve	Call immediately - do not cap the valve
Yellow or orange flame *(gas)*	Incomplete combustion	Burner service required
Rising energy bills, unchanged usage	Sediment reducing efficiency	Schedule flush
Pilot failures or ignition issues *(gas)*	Thermocouple degradation	Service visit required

SERVICE DOCUMENTATION LOG

Field	Visit 1	Visit 2	Visit 3	Visit 4
Date				
Visit Type	☐ Semi ☐ Annual	☐ Semi ☐ Annual	☐ Semi ☐ Annual	☐ Semi ☐ Annual
Technician / Company				
CA License #				
Sediment Flush	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Bacteria Flush	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
T&P Valve	☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Pass ☐ Fail
Anode Rod	☐ Good ☐ Replaced	☐ Good ☐ Replaced	☐ Good ☐ Replaced	☐ Good ☐ Replaced
Burner/Elements	☐ Normal ☐ Serviced	☐ Normal ☐ Serviced	☐ Normal ☐ Serviced	☐ Normal ☐ Serviced
Leaks Found	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Parts Replaced				
Issues Noted				
Follow-Up Required	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Next Service Due				