



## WATER SOFTENER EVALUATION AND OPTIMIZATION REPORTING FORM

### Village of McFarland Salt Savers Pilot Program

**Instructions:** Use these forms to collect information about softeners that you evaluate or optimize as part of the McFarland version of the pilot project. **This form is intended as an alternative reporting method to the Survey123 reporting app if you are unable to use the app.** Once you complete this form, you can submit the report to the Village of McFarland with one of the following options:

- Open the Survey123 form in your internet browser to enter and submit the information in this form. Access this survey at this link: <https://arcg.is/LSyD8> and select “Open in Browser.”
- Submit completed forms directly to the Village of McFarland. You can email a scanned copy to Aimee Irwin, [aimee.irwin@mcfarland.wi.us](mailto:aimee.irwin@mcfarland.wi.us).

This packet includes the following worksheets. Fill out the worksheets relevant to the job you are performing. Enter the street address of the job on each form you submit so information stays together.

- 1) Job Information and Certification Form – **to be submitted with all forms.**
- 2) Evaluation Form – to be submitted **once** for each existing softener being evaluated for this program.
- 3) Optimization Form
- 4) New Unit Installation Form – to be submitted when an eligible new unit is installed to replace an existing softener that has been identified as a clunker.

#### Hints:

- If an arrow icon (→) appears next to an answer, there is a recommended action associated with that answer. If you are able, follow the recommended action in the righthand column.
- The attachments to this packet include guidance for determining whether a softener qualifies as a clunker. If you have any questions or additions to this list based on your experience, please contact Emily Jones at Madison Metropolitan Sewerage District, [EmilyJ@madsewer.org](mailto:EmilyJ@madsewer.org) or 608-867-4850.

## Job Information and Certification Form

Job information	
Provider name:	Company:
Street address of job:	
	Street number and name, municipality, zip
Customer Utility Account Number:	

Actions taken		
<p>Select all actions you took during this job:</p>	<input type="checkbox"/> Provided softener evaluation.	
	<input type="checkbox"/> Performed softener optimization.	
	<input type="checkbox"/> Recommended replacement of an inefficient unit.	
	<input type="checkbox"/> Replaced a clunker softener with a new, eligible unit.	
	<input type="checkbox"/> Referred customer to another service provider.	
	<input type="checkbox"/> Disconnected hose bibb from softener.	
	<input type="checkbox"/> Fixed leak in soft water-using fixture.	
	<input type="checkbox"/> Other action: _____ _____ _____	

Certification	
<input type="checkbox"/> I certify that all information in this form is accurate to the best of my knowledge. <input type="checkbox"/> I certify that I charged the customer the standard price for this service. <input type="checkbox"/> I certify that this property is in the Village of McFarland and is connected to Madison Metropolitan Sewerage District's sanitary sewer.	
Signature:	Date:

For reference only	
Service	Rebate amount customer qualifies for
Softener evaluation	\$75
Softener evaluation and optimization	\$75
Softener evaluation + installation of new unit replacing clunker unit (same job)	\$200
Installation of new unit replacing identified clunker unit	\$200

## Evaluation Form

Soft water use of building		
What water is softened in this building?	<input type="checkbox"/> Hot and cold water go through the softener <input type="checkbox"/> Hot only – no cold water is softened <input type="checkbox"/> Unknown	
Does the outdoor hose bibb receive softened water?	<input type="checkbox"/> Yes → <input type="checkbox"/> No	<b>Recommended action:</b> if the hose bibb is softened, it should be disconnected from the softener.
Are leaks evident in fixtures that use softened water?	<input type="checkbox"/> Yes → <input type="checkbox"/> No	<b>Recommended action:</b> fix leaks in fixtures that use softened water.

Softener evaluation		
Does this water softener regenerate based on days or based on gallons?	<input type="checkbox"/> Day-based (time-clock) → <input type="checkbox"/> Gallon-based (demand) <input type="checkbox"/> Unable to determine	<b>Recommended action:</b> If the softener is a time-clock, recommend replacement.
What is the softener's age?	<input type="checkbox"/> Under 15 years <input type="checkbox"/> 15 years or older → <input type="checkbox"/> Unable to determine	<b>Recommended action:</b> If the softener is 15 years old or older, recommend replacement.
Softener type:		
	Brand	Model
Is this softener optimizable or a "clunker"? (See attached list)	<input type="checkbox"/> Optimizable → <input type="checkbox"/> Clunker → <input type="checkbox"/> Unknown	<b>Recommended action:</b> If this softener is a clunker, recommend replacement. If it is optimizable and you are able, optimize the softener using the Optimization Form.

**Comments:** If you have any clarification on these answers, please enter your comments here. Otherwise, you can leave this field blank.

## Optimization Form

If you identify a softener as optimizable, complete this form to indicate what settings you looked at and what you were able to change to an optimized setting. **Only optimize softener models that you are familiar with.** Be aware that changing the salt dosage on a softener may also require replacing parts and changing the grain capacity as well, so if you are not sure what exactly needs to be done to optimize a unit, it is best to refer the optimization to another provider familiar with that unit.

Source water hardness			Is iron present at a level of 0.3 mg/L or higher?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Grains per gallon			
<b>Softener Setting</b>	<b>Unable to access</b>	<b>Original setting</b>	<b>Optimized setting</b>	<b>Target for optimization</b>
Hardness setting	<input type="checkbox"/>			Hardness setting should match source water hardness (if iron or manganese not significantly present).
		Grains per gallon	Grains per gallon	
Salt dosage	<input type="checkbox"/>			Softener should be set to the lowest possible salt dosage.
		Pounds	Pounds	
Grain capacity	<input type="checkbox"/>			Grain capacity should reflect rated capacity at optimized salt setting adjusted for age.
		Grains	Grains	
Gallon capacity (if capacity is set in gallons)	<input type="checkbox"/>			Gallon capacity should reflect rated capacity at optimized salt setting, adjusted to account for age and water hardness.
		Gallons	Gallons	
Reserve capacity (if set manually)	<input type="checkbox"/>			Reserve capacity should match average daily soft water use of home.
		Gallons	Gallons	
<b>Other settings</b>				
Does this softener have a time-clock override on?	<input type="checkbox"/> Yes → <input type="checkbox"/> No			<b>Recommended action:</b> If the override is on, it should be set to no less than 14 days.
Does this softener have a "salt efficiency" mode?	<input type="checkbox"/> Yes → <input type="checkbox"/> No			<b>Recommended action:</b> Make sure that the salt efficiency mode is set to "On."
<b>Comments:</b> If you were not able to access or optimize any aspects of this softener, or if you have any clarifications to add about this optimization, please add your comments here. Otherwise, you can leave this field blank.				

## New Unit Installation Form

### Evaluation status

- ☐ The existing softener has already been evaluated on a previous job and identified as a clunker.
- In this scenario, you do not need to evaluate the softener again. Submit this form with the Certification form.
- ☐ The existing softener has not already been evaluated, and I am evaluating this unit on this job.
- In this scenario, submit the **Evaluation Form** with this form and the Certification form.

➔ Fill out one of the following sections, depending on whether you are installing a new water softener or another unit that does not use salt.

New water softener			
Source water hardness	Grains per gallon	Is iron present at a level of 0.3 mg/L or higher?	<input type="checkbox"/> Yes <input type="checkbox"/> No
New softener type:	<div style="display: flex; justify-content: space-between;"> <span>Brand</span> <span>Model</span> </div>		
Setting		Target Setting	
Hardness setting	Grains per gallon	Hardness setting should match source water hardness (if iron or manganese not significantly present).	
Salt dosage	Pounds		
Grain capacity	Grains	Grain capacity should be adjusted to the rated capacity that corresponds to the programmed salt setting.	
Reserve capacity (if set manually)	<input type="checkbox"/> Reserve capacity set to Auto <div style="text-align: center;">Gallons (manual)</div>		
Other settings			
Does this softener have a time-clock override on?	<input type="checkbox"/> Yes ➔ <input type="checkbox"/> No		<b>Recommended action:</b> If the override is on, it should be set to no less than 14 days.
Does this softener have a "salt efficiency" mode?	<input type="checkbox"/> Yes ➔ <input type="checkbox"/> No		
<b>Comments (optional):</b>			
New salt-free water treatment device			

*(Section for new salt-free device on reverse)*

Name of device:		
	Brand	Model
<b>Certification</b>		
<input type="checkbox"/> I certify that I am familiar with this device and have installed it according to manufacturer recommendations and appropriate to source water conditions.		
<input type="checkbox"/> This device is replacing a water softener identified as a clunker and is not being installed in addition to a water softener.		
<b>Comments (optional):</b>		

## Attachment 1: Time-clock vs. Demand-initiated examples

This **time-clock** control head has a circle labeled “Day” with numbered pins going around the circle. The number corresponds to the number of days between regenerations.

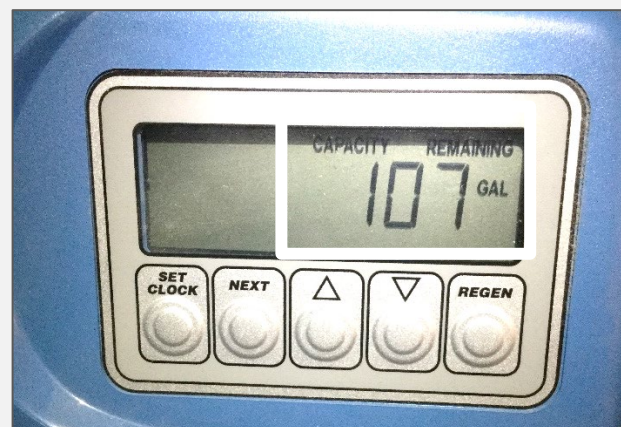
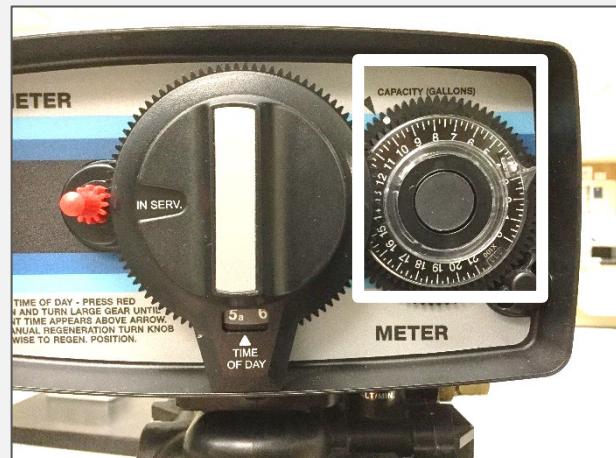
➔ Look for the “Day” label near a wheel or dial.



This **demand-initiated** control head has a dial labeled “Capacity (Gallons)” with numbers around the dial. The numbers on the dial correspond to the number of gallons between regenerations.

➔ Look for the “Gallons” label near a dial on an analog control head, or on a screen on a digital control head

Note that there is still a clock on demand-initiated control heads, but that does not mean they are time-clocks! The “time of day” setting on demand-initiated softeners sets the time of day that the softener regenerates, not the day that it regenerates.



## Attachment 2: Optimizable and Clunker Softeners List

The softeners on these lists have been categorized as “clunkers” (water softeners unable to meet the desired salt efficiency) and optimizable units (water softeners that can be configured to meet a higher efficiency).

This list was compiled by the District from the manufacturers of these brands of softeners. This is **not** a complete list of every softener that may be encountered; it is meant to provide guidance on the condition of water softeners that are commonly found in the District’s service area. This list may change or expand as the District gathers more information about existing softeners in the service area.

➔ If you encounter a water softener on this list that is classified as a “clunker,” recommend replacement of that unit. If it is optimizable, you can recommend that the customer have their softener optimized by a trained service provider or, if you are trained, perform an optimization yourself.

Capital Water	
Clunkers	Optimizable
C-24	CFLM-24
C-32	CFLM-32
CM 24	FLM 24
CM 32	FLM 32
E-16	WS-24
E-24	WS-32
FA-16	WS-48
FA-24	WS-24-ER
FA-32	WS-32-ER
FL-24	WS-48-ER
FL-32	WS-24-HE4000
M 24	WS-32-HE4000
M 32	WS-48-HE4000
MPS-24	
MPS-32	

Fox Water	
Clunkers	Optimizable
24DP	24DC
16/M	32DC
24/M	48DC
32/M	24DPH
48/M	32DPH
16/MW	48DPH
24/MW	32DP
32/MW	48DP
48/MW	24DBW
16P	32DBW
24P	48DBW
32P	
48P	
E16	
E24	
E32	
E48	



Culligan	
Clunkers	Optimizable
Estate 2m	Gold 9"
Mark 100 9"	Gold 10"
Mark 100 12"	HE 10 "
Mark 59	HE Sensor 9"
Mark 89	Medallist 8"
Northbrook 8	Medallist Plus 30
	Medallist Plus 45

Hellenbrand	
Clunkers	Optimizable
AM1-16E	E3-24
AM1-24E	E3-32
AM1-32E	E3-48
AM1-48E	EcoMax-8
PS1-16E	EcoMax-9
PS1-24E	EcoMax-10
PS1-32E	F/FM- 800
PS1-48E	F/FM -1200
	F/FM -1600
	F/FM -2250
	H100-24
	H100-32
	H100-48
	H125-32
	H125-48
	H125-64
	H125 HE-10
	H125 HE-12
	H125 HE-13
	H125 HE-14
	PRO100-024
	PRO100-032
	PRO100-048
	WM1-16M
	WM1-24M
	WM1-32M
	WM1-48M

*Use this space to take notes on other identified softeners.*

Clunkers	Optimizable