HOMEOWNER WORKBOOK

Your simple guide to protecting, maintaining & understanding your home

HOME INFORMATION	YOUR NOTES
Home Address	_____
Closing Date	_____
Builder / Year Built	_____
Heating System	_____
Cooling System	_____
Water Heater	_____
Water Source	☐ Public ☐ Well
Sewer	☐ Public ☐ Septic
Electric Provider	_____
Gas / Propane Provider	_____

The #1 rule of homeownership
Small problems are usually cheap. Big problems are usually expensive. A few minutes of preventive maintenance each month can save thousands of dollars.

KNOW YOUR PROPERTY

One of the most important things a new homeowner can do is learn where the major systems and underground features are located. Walk the property with the previous owner, builder, inspector, or agent and mark these locations before you need them.

PROPERTY ITEM	LOCATION / NOTES	DONE
Well head / well equipment	_____	☐ Located
Septic tank	_____	☐ Located
Septic drain field	_____	☐ Located
Propane tank	_____	☐ Located
Main water shutoff	_____	☐ Located
Electrical meter	_____	☐ Located
Main electrical panel	_____	☐ Located
Propane / gas shutoff	_____	☐ Located
Sewer cleanout	_____	☐ Located
Sump pump & pit	_____	☐ Located
Sump discharge	_____	☐ Located
Exterior hose-bib shutoffs	_____	☐ Located
HVAC equipment	_____	☐ Located
Water heater	_____	☐ Located
Oil tank (if applicable)	_____	☐ Located

☐ Ask for a copy of the septic permit/site plan and keep it with your home records.

☐ Know the location of the well head and keep the area accessible for inspection and service.

☐ Know the propane tank location, tank ownership/lease information, and propane supplier.

☐ Know where underground utility lines enter the house and where private lines run across the property.

☐ Locate irrigation lines, invisible-fence wires, exterior lighting, drainage pipes, French drains and other private underground systems.

BEFORE YOU DIG: Contact 811 before digging for fences, trees, landscaping, sheds, drainage work, decks or other excavation. Public utility markings may not identify every privately installed line.

PROPERTY MAP — MARK IT BEFORE YOU FORGET

DRAW / MARK HERE	NOTES
House / driveway / road	_____
Well	_____
Septic tank	_____
Drain field	_____
Propane tank	_____
Utility lines	_____
Water / sewer lines	_____
Sump discharge / drainage	_____
Other underground systems	_____

How to Use This Workbook

Keep this workbook somewhere easy to reach. Walk through the checklists when you move in, then use the seasonal and annual pages to stay ahead of maintenance.

☐ 1. Know your home — shutoffs, breakers, equipment and emergency contacts
☐ 2. Monthly maintenance — the quick routine
☐ 3. HVAC & indoor air — filters, vents, condensate and humidity
☐ 4. Plumbing & water — leaks, hose bibs, water heater and sump pump
☐ 5. Electrical & life safety — smoke/CO alarms, breakers and GFCIs
☐ 6. Exterior — gutters, downspouts, roof, siding, grading and drainage
☐ 7. Seasonal checklist — spring, summer, fall and winter
☐ 8. Appliances & systems — what homeowners forget
☐ 9. Emergency guide — what to do when something goes wrong
☐ 10. Home maintenance log — record what you did and when

1. Know Your Home Before You Need To

On move-in day, locate these items. Do not wait for a burst pipe, electrical problem or winter freeze to figure them out.

ITEM	WHERE IS IT?	DATE LOCATED / TESTED
Main water shutoff	_____	_____
Water meter	_____	_____
Main electrical panel	_____	_____
Main breaker	_____	_____
HVAC filter(s)	_____	_____
Water heater shutoff	_____	_____
Gas shutoff / propane	_____	_____
Sump pump	_____	_____
Sump pump battery backup	_____	_____
Exterior hose bib shutoffs	_____	_____
Septic cleanout (if applicable)	_____	_____
Well equipment (if applicable)	_____	_____
Fire extinguisher(s)	_____	_____

Emergency water leak
If water is actively leaking and you cannot immediately stop it at the fixture, shut off the home's main water supply. Then call a plumber. If electrical equipment is wet, do not touch it—turn off power only if it can be done safely.

2. Your 15-Minute Monthly Home Check

Set one day each month for this quick walk-through.

☐ Check under sinks for drips, dampness, stains or cabinet swelling.
☐ Look around toilets for leaks or soft flooring.
☐ Check the water heater for signs of leaking or corrosion.
☐ Look at the basement/crawlspace for water, dampness or unusual odors.
☐ Check the sump pit and make sure the pump is not blocked.
☐ Test smoke and carbon-monoxide alarms according to the manufacturer's instructions.
☐ Check HVAC filters and replace/clean them as appropriate for your system and filter type.
☐ Look at ceilings and walls for new stains or cracks.
☐ Walk around the exterior and look for standing water, damaged siding or loose trim.
☐ Make sure downspouts are still directing water away from the foundation.
☐ Check that exterior doors and windows close and latch properly.

Monthly Notes

DATE	WHAT I CHECKED / FOUND	ACTION NEEDED
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. HVAC & Indoor Air

Air Filters

A dirty filter can reduce airflow and make your system work harder. The correct replacement schedule depends on the system, filter size/type, pets, dust and household conditions. Check it monthly until you learn how quickly yours gets dirty.

☐ Write down the filter size: _____

☐ Write down where the filter is located: _____

☐ Check the filter monthly.

☐ Replace or clean it according to the filter/system manufacturer's instructions.

☐ Never install a filter that does not fit correctly.

☐ If airflow is weak, the system freezes, or the HVAC runs constantly, call an HVAC professional.

Other HVAC Tasks

☐ Keep supply and return vents unobstructed by furniture, rugs or curtains.

☐ Keep the outdoor condenser clear of leaves, weeds and debris.

☐ Keep the area around the indoor furnace/air handler clear.

☐ Check the condensate drain/pan for standing water or overflow.

☐ Have HVAC equipment professionally serviced as recommended by the manufacturer or service provider.

Important
Do not guess at refrigerant, electrical, gas or combustion-system repairs. Those jobs are for qualified professionals.

4. Plumbing & Water

Know Where the Water Goes — and How to Stop It

☐ Find the main water shutoff and make sure it is accessible.

☐ Know how to shut off individual toilets and sinks.

☐ Check washing-machine supply hoses and connections for leaks or bulges.

☐ Check dishwasher and refrigerator water connections if equipped.

☐ Never ignore a slow drip or damp cabinet and clean faucet aerator occasionally.

Water Heater

☐ Know whether your water heater is gas, electric or another type.

☐ Know where its water shutoff is located.

☐ Check periodically for leaks, rust, corrosion or unusual noises.

☐ Follow the manufacturer's maintenance instructions.

☐ Keep the area around the water heater clear and safe.

Exterior Hose Bibs — Fall/Winter

☐ Disconnect every garden hose before freezing weather.

☐ If the home has interior shutoffs for exterior hose bibs, close them before freezing weather.

☐ Open the exterior faucet after the interior shutoff is closed, when applicable, to allow trapped water to drain.

☐ Do not assume a frost-free hose bib is immune to freezing; improper hose attachment or installation can still cause damage.

5. Basement, Sump Pump & Water Protection

If your home has a basement or crawlspace, water management is one of your highest priorities.

☐ Know where the sump pit is.

☐ Make sure the pump has power.

☐ Test the pump periodically using the manufacturer's recommended method.

☐ Keep the discharge pipe clear.

☐ Confirm the discharge sends water away from the foundation.

☐ If you have a battery backup, check its status and test it according to the backup system's instructions.

☐ Know whether your backup pump, battery, or controller needs periodic replacement.

☐ Keep valuable items off the basement floor if the area is vulnerable to flooding.

Battery backup reminder
A battery backup is only useful if the battery is healthy and the discharge line works. Put the battery replacement date in your calendar and follow the manufacturer's testing instructions.

6. Electrical & Life Safety

Smoke & Carbon-Monoxide Alarms

☐ Test alarms according to the manufacturer's instructions.

☐ Replace batteries when required by the alarm manufacturer—or use sealed units with the manufacturer's stated service life.

☐ Replace smoke alarms according to the manufacturer's replacement guidance; many models have a limited service life.

☐ Keep alarms free of dust and paint.

☐ Do not disable an alarm because of nuisance alarms—find and correct the cause.

☐ Know the difference between smoke alarms and carbon-monoxide alarms; you may need both.

Electrical Safety

☐ Know where the main electrical panel is located.

☐ Label major breakers if they are not already labeled.

☐ Know which outlets are GFCI protected.

☐ Test GFCI devices according to their manufacturer's instructions.

☐ Do not use damaged cords, cracked outlets or warm/discolored receptacles.

☐ Do not repeatedly reset a breaker that keeps tripping—find the cause or call an electrician.

Emergency
If you smell burning, see smoke, hear unusual electrical buzzing, or notice a hot/discolored outlet, stop using the equipment and have it evaluated promptly. For an active fire, leave the home and call 911.

7. Exterior: Water Is Your Home's Enemy

Gutters

☐ Inspect gutters at least twice a year and after major storms.

☐ Remove leaves, sticks and debris.

☐ Check for sagging sections or separated joints.

☐ Make sure water flows toward downspouts.

☐ Look for water spilling over the front or back edge during rain.

Downspouts

☐ Make sure downspouts are connected.

☐ Make sure the discharge point moves water away from the foundation.

☐ Keep extensions in place and unobstructed.

☐ Do not direct concentrated roof runoff toward the foundation, driveway settlement area or neighboring property.

Grading & Drainage

☐ Look for low spots where water collects next to the house.

☐ Watch for erosion near downspouts.

☐ Do not pile soil or mulch against siding or exterior materials.

☐ If water repeatedly enters the basement/crawlspace, investigate the drainage problem rather than repeatedly treating the interior symptom.

Roof & Exterior Walk-Around

☐ Look for missing, damaged or lifted shingles/roof materials from the ground.

☐ Look for damaged flashing around chimneys, vents and roof penetrations.

☐ Check siding, trim, caulked joints and exterior doors for obvious deterioration.

☐ Keep vegetation trimmed away from the house.

☐ After severe weather, inspect for obvious damage and call a qualified professional if needed.

8. Seasonal Home Maintenance Calendar

SPRING

☐ Clean/inspect gutters and downspouts.
☐ Check roof and exterior after winter storms.
☐ Inspect hose bibs and exterior plumbing for freeze damage.
☐ Turn on exterior water and check for leaks.
☐ Service/inspect HVAC cooling system as appropriate.
☐ Check sump pump and backup system.
☐ Inspect decks, stairs, railings and fences.
☐ Look for standing water and drainage problems.
☐ Replace HVAC filter if needed.

SUMMER

☐ Keep gutters/downspouts clear during storm season.
☐ Keep HVAC condenser area clear.
☐ Watch for condensation or HVAC drain issues.
☐ Inspect exterior caulk and paint/sealant.
☐ Check attic/garage for unusual heat, moisture or roof leaks.
☐ Trim vegetation away from siding, roof and utility equipment.

FALL

☐ Clean gutters and downspouts before leaf season and again as needed.
☐ Disconnect garden hoses before freezing temperatures.
☐ Close/bleed exterior hose bibs if the plumbing system requires it.
☐ Check heating system before cold weather.
☐ Replace HVAC filter if needed.
☐ Test smoke and CO alarms.
☐ Inspect sump pump and backup battery.
☐ Locate snow/ice tools and emergency supplies.

WINTER

☐ Know where the main water shutoff is in case of a frozen/burst pipe.
☐ Protect vulnerable pipes from freezing according to the home's construction and local conditions.
☐ Keep heat on during freezing weather, including when traveling.
☐ Watch for ice dams, roof leaks and frozen plumbing.
☐ Keep exterior vents and exhaust outlets clear of snow.

9. Appliances & Often-Forgotten Maintenance

SYSTEM / ITEM	WHAT TO DO	HOW OFTEN
Refrigerator	Clean coils if the manufacturer recommends; check water line	Per manufacturer
Dishwasher	Clean filter and inspect supply/drain connections	Monthly / per manual
Range hood	Clean grease filter	Monthly / per use
Dryer	Clean lint screen every load; clean vent system as appropriate	Every load / periodically
Washing machine	Inspect hoses and connections; clean machine per manual	Monthly / per manual
Garbage disposal	Clean/maintain per manufacturer; never put prohibited items down it	As needed
Fire extinguisher	Check gauge/condition and accessibility	Monthly visual check
Garage door	Test safety/reverse features and inspect components	Periodically / per manual
Water softener	Check salt and service requirements if applicable	Monthly / per manual
Whole-house filter	Replace media/filter per manufacturer	Per manufacturer

Dryer safety
A clogged dryer vent can increase drying time and create a serious fire hazard. Keep the lint screen clean after every load and have the vent system cleaned/inspected as appropriate for your home.

10. Annual / Professional Maintenance

☐ Schedule HVAC professional maintenance as recommended for your system.

☐ Have chimneys/fireplaces inspected and cleaned as appropriate if used.

☐ Have septic systems inspected/pumped according to the system and household usage.

☐ Have well equipment/water quality checked as appropriate if on a private well.

☐ Inspect roof and flashing if there are signs of damage or aging.

☐ Inspect attic for moisture, leaks, insulation problems or pest activity.

☐ Inspect crawlspace for moisture, standing water or damaged insulation.

☐ Review homeowner's insurance coverage and keep a current home inventory.

☐ Review and refresh your emergency contact list.

☐ Check the age and condition of major systems and start planning for future replacement rather than waiting for failure.

11. When Something Goes Wrong

PROBLEM	FIRST STEP	THEN
Burst / major water leak	Shut off main water if safe	Call plumber; document damage
No heat in freezing weather	Check thermostat/power/fuel	Call HVAC; protect pipes
Breaker keeps tripping	Stop using affected circuit	Call electrician if cause is not obvious
Sump pump not working	Check power/backup system	Call plumber/basement-water professional
Gas smell	Leave area; avoid switches/flames	Call 911/utility emergency line from a safe location
Sewer backup	Stop using water if possible	Call plumber/sewer service
Roof leak	Contain water if safe; avoid electrical hazards	Call qualified roofer
Fire / smoke	Leave immediately	Call 911

Emergency Numbers

CONTACT	PHONE / INFO
Emergency	911
Water utility	_____
Electric utility	_____
Gas / propane	_____
Plumber	_____
HVAC company	_____
Electrician	_____
Roofer	_____
Insurance agent	_____
Home warranty (if any)	_____

12. Home Maintenance Log

Use this page to keep a simple history. Save invoices, receipts, warranties and manuals with your home records.

DATE	SYSTEM / TASK	WHAT WAS DONE	WHO DID IT	NEXT DUE
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Major Systems & Replacement Planning

SYSTEM	INSTALL / PURCHASE DATE	MODEL / SERIAL	EXPECTED LIFE / NOTES
Roof	_____	_____	_____
HVAC	_____	_____	_____
Water heater	_____	_____	_____
Sump pump	_____	_____	_____
Appliances	_____	_____	_____
Windows / doors	_____	_____	_____

13. The One-Page Homeowner Cheat Sheet

If you only remember a few things, remember these:

☐ KNOW YOUR SHUTOFFS: Find the main water shutoff and electrical panel before an emergency.

☐ CHANGE/CHECK FILTERS: A small filter is one of the easiest things to forget.

☐ KEEP WATER MOVING AWAY: Gutters + downspouts + grading protect your foundation.

☐ WATCH THE BASEMENT: Sump pump + backup battery + discharge line all matter.

☐ WINTERIZE HOSE BIBS: Disconnect hoses and close/drain lines when your system requires it.

☐ TEST LIFE-SAFETY DEVICES: Smoke and CO alarms are not 'set it and forget it' items.

☐ LOOK UNDER SINKS: A tiny leak can quietly destroy cabinets and flooring.

☐ DON'T IGNORE SMALL CHANGES: New stains, smells, noises, cracks or dampness deserve attention.

☐ KNOW WHEN TO CALL A PRO: Gas, major electrical, roof, structural, HVAC refrigerant and serious plumbing issues should be handled by qualified professionals.

☐ KEEP RECORDS: Maintenance history increases your confidence as a homeowner and can help when you sell.

HOMEOWNERSHIP GETS EASIER WHEN YOU HAVE A SYSTEM.

QUESTIONS ABOUT YOUR HOME?

Kelly Andrews Real Estate
703-975-9756 • kandrews.realtor@gmail.com
www.KellyAndrews.RealEstate
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