

Wx-REF Process

Eligibility	<p>The first priority for the Weatherization Agency is to ensure client has current HE+ eligibility. Some Weatherization jobs will need a heating system addressed, but the client is no longer eligible for WHEAP furnace funds.</p>
Weatherization Agency Responsibilities	<ol style="list-style-type: none"> 1. Check that applicant has current WHEAP eligibility; and/or 2. Work closely with WHEAP agency to ensure priority eligibility verification for clients who have expired WHEAP eligibility. <ul style="list-style-type: none"> ▪ WHEAP agency informs Wx agency when eligibility is re-established.
When Eligibility is Established	<ol style="list-style-type: none"> 1. Provide WHEAP the estimated repair or replacement funds to be reserved. 2. Inform WHEAP of any health and safety needs for the household due to the heating system. 3. Repair or replace the heating system as part of the Weatherization job. 4. Invoice WHEAP and provide: <ul style="list-style-type: none"> ▪ Total repair/replacement cost (no break-out needed); and ▪ Weatherization fee (expected to be minimal if any).
How To Access Wx-REF Funds	<p>The Weatherization agency contacts the WHEAP agency and requests funds.</p>
Record Keeping Requirements	<p>Weatherization agency shall:</p> <ul style="list-style-type: none"> ▪ Maintain documentation; ▪ Establish internal controls to prevent accidental double-billing for Wx-REF. ▪ Ensure that staff is tracking time appropriately.
Tracking and Assigning Expenses	<p>It is expected that Wx-REF will require less administrative and staff time because it is already part of a Weatherization job. The following expenses will always be charged to the Wx-REF job:</p> <ul style="list-style-type: none"> ▪ Contractor (or staff) Heating System work. ▪ Staff time managing contractor and callbacks. ▪ Administrative time processing Wx-REF invoice. <p>Typically, assessment and inspection expenses will be charged to the Weatherization job.</p> <p>Exceptions:</p> <ul style="list-style-type: none"> ▪ If the weatherization job is deferred, charge the audit to the weatherization job, and record the inspection and other administrative expenses to Wx-REF. ▪ If a Weatherization job is deferred and Limited Weatherization Services* are provided, and Wx-REF furnace funds are used to pay for heating system work, the energy audit and Limited Weatherization Services are charged to Weatherization. The inspection could be charged to Weatherization or to Wx-REF. ▪ There could be an assessment charged as part of Wx-REF; however, this is expected to be an exception.

*Limited Weatherization (Wx) Services – (formerly 'Baseload' Services) is new for FY2013. Only 5% of limited Wx jobs require final inspections. In contrast, every WX job requires a final inspection.