

Attachment 6 – Administrative Requirements for Home Energy Plus (HE+) Furnace Program (rev. 10/01/2014)

This section reflects the program requirements for Contractor work performed under the HE+ Furnace Program – Emergency and Non-emergency Services. Rigid time constraints apply during the Heating Season (per the RFB sections 6.2 and 6.10). The job may include both an Assessment and Repair or Replacement, or the Assessment only.

A. Ineligibility for Program Services Due to Structural/Other Reasons

When the following conditions are observed, the Contractor shall cease the provision of services and notify the Weatherization Agency (**Agency**) immediately:

- There is no existing furnace/heating unit installed in the dwelling.
- Building contains a residential and a commercial unit where the residential and commercial units share a furnace.
- New construction or units under major remodeling.
- Recreational vehicles and other ineligible structures/vehicles that have been modified with permanent additions, or made immobile by putting onto blocks or otherwise attaching them to a site.
- The heating system is working and there is no safety concern. A 'no heat' situation does not exist when there is a secondary heating system capable of providing the required heat to the dwelling.
- Service cannot be provided to the dwelling because of the condition of the dwelling, housekeeping or sanitation issues, or perceived threats to worker safety.
- Applicant has altered the operation of the furnace, or has mistreated the furnace.
- Situations where a unit meeting the efficiency guidelines is not safe for the size of the space/dwelling.
- The heating system is not associated with the eligible unit identified by the Agency.
- Other reasons specific to the dwelling or household.

B. Repairs & Replacements

The following requirements apply to the provision of services (repairs or replacements):

- Every heating system shall be assessed to determine structural eligibility and identify any safety concerns (RFB Attachment 4).
- The determination to repair or replace a heating system shall be a reasonable and appropriate solution to the situation.
- Provide services only for the primary fuel heating system in the dwelling, except when the fuel type is being changed. See provisions below for Fuel Switching.
- Only one heating unit may be replaced in a dwelling, except when the heating units are space/room heaters.
- Replacement of an electric heating unit with an electric heating unit is not allowed (see Fuel Switches section).
- Replacement/heating units shall meet or exceed the minimum efficiency guidelines (except wood stoves/furnaces) in Table 1 (RFB Attachment 4), unless prior approval has been obtained from the Agency.
- For all heating unit replacements, the Contractor shall satisfy the Technical Specifications (RFB Attachment 4) and shall ensure that installation procedures and units meet appropriate codes, ordinances and standards.

C. Collateral Activities

Collateral Activity is work performed to meet Technical Specifications (RFB Attachment 4) or other RFB requirements and is in addition to work required to install the basic heating system. Collateral work associated with a heating unit replacement shall be approved by the Agency and is included as part of the calculation of the total cost for replacement.

When invoiced, the Contractor shall identify all collateral work performed. Follow Agency directions for reporting cost (see RFB Attachment 5). Examples of collateral activities include:

- Building permits (see RFB for requirements).
- Duct work necessary to achieve the required air flow for the furnace.
- Electrical work necessary to run a dedicated line from the main service box to the furnace/boiler.
- Pipe work and valves necessary to get the hot water/steam from the boiler into the distribution system.
- Chimney repairs when part of a furnace repair/replacement. This may include chimney liners, and may be required to meet building codes. The repairs must be necessary to meet health and safety standards or code.
- If asbestos abatement is necessary when replacing a heating unit, it shall be addressed and the abatement shall be performed by individuals that are trained, and certified (if required), for asbestos related work (see RFB and Appendix A).
- A 'clean and tune' may be incorporated into a repair job only as needed (RFB Attachment 4).

D. Assessment & Decision to Repair or Replace

It is expected there will be an assessment of the furnace on every referral even if there is no resulting repair or replacement work (e.g., when the heating system is working safely or the dwelling is ineligible). When there is no replacement or repair needed, the cost of the assessment shall be identified on the invoice.

The Agency is responsible for authorizing the installation of repairs and/or replacements. This is addressed in RFB Section 6.2. The Contractor shall follow the direction provided by the Agency regarding this decision-making authority, and the authorization to proceed with such work.

E. Invoice and Documentation

See Attachment 5 for specific instructions for invoice requirements and necessary documentation. Documentation requirements identified in the RFB and in RFB-Attachment 4 apply to work performed under this contract.