

Federal Fiscal Year (FFY) 2017 Wisconsin Home Energy Assistance Program (WHEAP) Operations Manual Summary of Changes

The table below is a quick reference guide of key changes made to the FFY 2017 WHEAP Operations Manual. The list is not all inclusive of every change, nor is it a direct policy reference. All policies listed below shall be reviewed in entirety in the full FFY 2017 WHEAP Operations Manual. All changes in the manual are highlighted in yellow.

Manual Reference		Summary of Change
2.2.2	Residence	<ul style="list-style-type: none"> Removed “length of stay” reference Added guidance regarding where they reside on date of application
2.2.3.5	Change SSN Request	<ul style="list-style-type: none"> Additional guidance for Change SSN request
2.3.1	General	<ul style="list-style-type: none"> Added language that agencies may consider landlord’s assets for Crisis Assistance benefits or furnace services
2.3.2	Counting Income	<ul style="list-style-type: none"> Added guidance on computing Social Security Disability when also receiving Long Term Disability
2.3.5	Self-Generated Income	<ul style="list-style-type: none"> Additional guidance on calculating self-employment income Added new requirement for Rental Income verification
2.3.5.1	Verification of Income – Self-Generated Income	<ul style="list-style-type: none"> Additional guidance on calculating Partnerships income Added new requirement for Rental Income verification
2.3.5.2	Use of Self-Generated Income Report Form	<ul style="list-style-type: none"> Added language that S-GIRF cannot be used to report Rental Income
2.3.5.3	Self-Generated Income and Annual Fuel Use	<ul style="list-style-type: none"> Additional guidance on completing test when business address is the same as home address
2.3.6	Seasonal Workers’ Income	<ul style="list-style-type: none"> Guidance on when to include seasonal workers’ income and required System Notes for determination
2.3.7	Income Counted Table	<ul style="list-style-type: none"> Clarification on student income (ignore financial aid) Clarification on calculating monthly gross benefit and lump sum income for persons under 70 years of age for Pensions, Annuities, and Deferred Compensation (IRA, 401k, 503b, etc.) Additional guidance on computing Social Security Disability when also receiving Long Term Disability Clarification on entering Rental Income Clarification on ‘Wage’. Income to base on payment/check date Added spouse and children to benefit paid for Social Security (Retirement) and Social Security Disability Insurance
2.3.9	Ignored Income Table	<ul style="list-style-type: none"> Clarification on student income (ignore financial aid) Removed proof of loan requirement Removed non-household member costs Clarification that lump sum payment for anyone under 70 years of age is ignored Added Jury Duty income
3.1.3	When to Apply	<ul style="list-style-type: none"> Additional guidance on when Early Application can be accepted
3.2.6	File Retention	<ul style="list-style-type: none"> Added new requirement on retaining IRS 1040 and Schedule E form for Rental Income Additional guidance on retaining documents when applicable
3.3.2	Verification of Information	<ul style="list-style-type: none"> Additional guidance on retaining documents when applicable
3.4.28	Field #21 Household	<ul style="list-style-type: none"> Clarification on entering information to ‘Verification’ field Additional guidance for adding income types with zero income

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3.4.28.3	Use of Zero Income Form	<ul style="list-style-type: none"> Additional guidance on using Zero Income Form New section/requirements on the Zero Income Form
3.4.29.2	Primary Heating Fuel	<ul style="list-style-type: none"> New guideline requiring System Notes when 'Other' fuel type is selected
3.4.29.7	Annual Fuel Cost	<ul style="list-style-type: none"> Additional guidance on WEFI results
4.1	Crisis Assistance	<ul style="list-style-type: none"> Clarification on minimum crisis payment of \$30
4.2.1	General Eligibility Criteria	<ul style="list-style-type: none"> Removed \$500 exception
4.2.2.1	Emergency Crisis Eligibility – Additional Guidelines	<ul style="list-style-type: none"> Additional guidance on requesting override for HE+ application waiting on SSN verification from SSA
4.2.4	Exceptions to the Crisis Benefit Limit	<ul style="list-style-type: none"> Removed \$500 exception
4.2.5	Exceptions to the Applicant Contribution Requirement	<ul style="list-style-type: none"> Removed \$500 exception
4.2.1.1	Income Eligibility Variations – Emergency Crisis	<ul style="list-style-type: none"> Language clarification on counting income for Emergency Crisis
4.5.2	Entering Crisis Applications	<ul style="list-style-type: none"> Added clarification on using 'General' allocation category Additional guidance on reviewing WEFI results and entering notes
4.6.2	LIHEAP Funded Payment Codes	<ul style="list-style-type: none"> Added another payment option to PPAS – LIHEAP Proactive Payment code Added PSPA – LIHEAP Spring Proactive Assistance Payment Code and description
4.6.3	Public Benefit Funded Payment Codes	<ul style="list-style-type: none"> Removed PBTL – PB Crisis Code
6.3.8	Wrong Vendor Entered on Application	<ul style="list-style-type: none"> Additional guidance on canceling benefit from incorrect vendor
7.9	Overpayments and Applicant Repayments	<ul style="list-style-type: none"> Added Weatherization Services as one of the benefit program for repayment Clarification on repayment for more than one heating year
8.2.4	Agency Information	<ul style="list-style-type: none"> Adjusted language on reviewing WHEAP agency information in HE+ System
8.2.4.2	Notification of New Subcontract	<ul style="list-style-type: none"> Added new requirement to inform the Division if changing existing subcontractors
8.2.9	Fraud	<ul style="list-style-type: none"> Clarification on repayment for more than one heating year
8.5.3	General Record Retention	<ul style="list-style-type: none"> Added new requirement on retaining IRS 1040 and Schedule E form for Rental Income Additional guidance on retaining documents when applicable
8.5.5	HE+ System Security	<ul style="list-style-type: none"> Added additional responsibility on accessing HE+ System
9.2	Invoice Filing Responsibility	<ul style="list-style-type: none"> Additional language added on final contract extraction
9.3	Guidelines for Invoicing	<ul style="list-style-type: none"> Clarification on invoicing
Appendix A	Agency Guidelines for Handling Sensitive Data	<ul style="list-style-type: none"> Updated language on accepting application via email
Appendix B	WHEAP Application Income Type	<ul style="list-style-type: none"> Added guidance on Rental Income on new requirement for retaining IRS 1040 and Schedule E Clarification on lump sum payment for anyone under 70 years of age is ignored