



**2017 HOME ENERGY PLUS FURNACE PROGRAM MANUAL
SUMMARY OF CHANGES
Changes effective October 1, 2016**

Section	Topic	Revision/Clarification
1.1	Overview	Revised to add: Rental properties, including single family homes, mobile homes and multi-family homes with up to four units are eligible for HE+ Furnace Program services when the criteria in Sections 3.4 and 3.5 of the FY17 Furnace Program Manual are met.
2.1	Chapter 2: Response Requirements WHEAP Agency Response Requirements	Revised to add: When referring any eligible rental dwelling to the Furnace Program, the WHEAP agency shall include in the initial furnace notes that the landlord/owner is WHEAP eligible and that tax forms were used to verify rental income. The landlord/owner's person ID shall also be included in the notes. See section 3.4 of the FY17 Furnace Program Manual for more information on rental dwelling requirements.
2.2	Chapter 2: Response Requirements Weatherization Agency Response Requirements	Added guidance to contact the HE+ Help Desk if the household has been provided temporary heat, or there is no threat to the safety of the residents but the emergency furnace service response time will go beyond 7 calendar days.
3.1.2	Chapter 3: Eligibility Emergency Furnace Referral with no SSN Verification	Revised to clarify that the HE+ system will not allow the WHEAP worker to make a referral without a verified SSN. Once the WHEAP worker visually verifies SSN and the Certification pages is signed, the referral will need to be sent manually until the SSN has been verified by the SSA allowing the WHEAP worker to create a system-generated referral.
3.2 (also affects 3.6.1, 6.2.1, 7.6)	Chapter 3: Eligibility Deferral Notification Requirements	Revised to clarify that it is the responsibility of the Weatherization agency to create and send a denial or deferral of service letter to the Furnace Program customer when denied or deferred by Weatherization agency.
3.3 (also affects 4.1, 6.1.1, 6.2.2, 7.3)	Chapter 3: Eligibility Homeownership (applies to all HE+ Furnace Program Services)	Revised to add: Homeownership documents shall contain either a print date or date stamp to document date of verification/receipt. Proof of homeownership document(s) must be dated prior to the furnace referral date.

<p>3.4 (also affects 3.5, 6.1.1, 7.3)</p>	<p>Chapter 3: Eligibility Rental Dwellings/Dwelling and Structural Eligibility</p>	<p>Revised to include single family and mobile home rentals where both the tenant and off-site building owner are currently WHEAP eligible and provide the appropriate tax forms WHEAP agency must retain copies of the landlord/owner's signed certification page, homeownership record and tax forms in the tenant's application file. If the landlord/owner resides in a different county/tribe, the worker must contact that county/tribe agency to verify and provide copies of the landlord/owner's signed certification page, homeownership record and tax forms. WHEAP Agencies must include in the initial furnace notes that the landlord/owner is WHEAP eligible and tax forms were used to verify rental income. The landlord/owner's person ID shall also be included in the notes.</p>
<p>4.1</p>	<p>Chapter 4: Operational Procedures General Responsibilities</p>	<p>Revised to add: Agencies with a tiered inspection process are required to submit their inspection plan to the division for approval prior to implementing.</p>
<p>4.1</p>	<p>Chapter 4: Operational Procedures General Responsibilities</p>	<p>Revised to add for final job invoicing: A furnace note shall be added when there is a delay beyond 45 calendar days (for Wx-Refs or Non-Emergency Referrals) as long as there is no conflict with the year-end FFY program deadline for invoicing.</p>
<p>5.2.3 (also affects 5.2.5)</p>	<p>Chapter 5: Technical Specifications and Requirements Replacements; Installation</p>	<p>Revised to add: Any identified re-work that is generated from a Quality Assurance inspection performed by the division will not be reimbursed by the program.</p>
<p>5.2.6</p>	<p>Chapter 5: Technical Specifications and Requirements Collateral Activities</p>	<p>Revised to add: If all other adjustments (gas pressure, O2, i.e.) do not bring the installed heating system's temperature rise into the heating system's manufacturers specifications, the Weatherization agency shall request a waiver by contacting the HE+ Help Desk (heat@wisconsin.gov or 608-267-3680).</p>
<p>6</p>	<p>Chapter 6: File Documentation</p>	<p>Revised number of years agencies shall retain documents from the date the Furnace Program application is submitted from five to three years.</p>

6.2.1	Chapter 6: File Documentation WHEAP Emergency or non-emergency Furnace Referral	Revised to add: For deferrals or denials: a copy of the Weatherization agency's letter of deferral/denial sent to client shall be included in the client's file
7.1.1	Chapter 7: HE+ System Data Entry HE+ System Dashboard—Recent Tasks	Explains new system enhancement that provides alerts to HE+ Program Staff regarding the status of certain applications and functions related to Furnace Program referrals and job cost invoicing.
8.1	Chapter 8: Cost-Related Requirements and Monthly Furnace Invoice Monthly Furnace Invoice for Program Support and Administrative Expenses	Revised to add that a broadcast email will be issued with the date that first monthly furnace invoices for this program are due.
8.2	Chapter 8: Cost-Related Requirements and Monthly Furnace Invoice Tracking expenses and reimbursement	Revised to clarify that the expenses associated with the Emergency Furnace assessment/inspection and the weatherization audit shall be tracked separately and accurately charged to each program (Wx or Furnace).
8.4	Chapter 8: Cost-Related Requirements and Monthly Furnace Invoice Furnace Program Administration Expenses	Revised to add: Administrative support expenses shall not exceed 10% of direct cost for repair and/or replacement and Program Support.
8.5	Chapter 8: Cost-Related Requirements and Monthly Furnace Invoice Furnace Program Support	Revised to add: Program support expenses shall not exceed 15% of direct cost for repair and/or replacement.
Form	Furnace Program Client Agreement	Disclaimer added to indicate that the HE+ Furnace Program does not service air conditioning units and is not liable for future maintenance and operation of air conditioning units.
Form	<u>Heating System Checklists</u>	Acceptable Draft Test Reading tables have been changed to reflect the new draft formula that is used in conjunction with the outside temperature at the time of the test.
Attachment 4	D. Specifications	Required AFUE increased to > 95%

	Natural Gas/LP Furnaces	
Attachment 4	D. Specifications Gas Boilers-High Efficiency	Comments: Modulating boiler, removal of 5.1 turndown ratio requirements. 5.1 turndown ratio is recommended when available
Attachment 4	D. Specifications Gas Boilers-Standard Efficiency	Required AFUE increased to > 84%, only allowable when high efficiency model not feasible.
Attachment 4	D. Specifications Manufactured Housing— Natural Gas/LP Furnaces	Required AFUE increased to > 95% Addition to comments: “Door should close fully”
Attachment 4	D. Specifications Manufactured Housing-Oil Furnaces	Addition to comments: “Door should close fully”
Attachment 4	D. Specifications Direct Vent Gas Space Heaters	AHRI Certification required: Yes Required AFUE > 80% Addition to comments: “Electronic Intermittent Pilot or Electric Ignitions. No standing pilot lights. No vent free units”
Attachment 4	D. Specifications “B” Vent/Inside Wall gas Space Heaters	AHRI Certification required: Yes Required AFUE: > 75% Addition to comments: “Air circulating fan required. Electronic Intermittent Pilot or Electric Ignitions. No standing pilot lights. No vent free units”
Attachment 4	D. Specifications Condensing Gas Space Heaters	AHRI Certification required: Yes Required AFUE: > 90% Addition to comments: “Installer shall implement a means to drain condensate (or deliver condensate to an approved drain). An evaporator pan is not an acceptable condensate management system. Air circulating fan required. Electronic Intermittent Pilot or Electric Ignition. No standing pilot lights. No vent free units”
Attachment 4	3. Replacing Space Heaters	Additional requirements: <ul style="list-style-type: none"> • Replacement space heaters shall have an

		Electronic Intermittent Pilot or Electronic Ignition <ul style="list-style-type: none">• Replacement space heaters shall not have a standing pilot light• Replacement space heaters shall not be vent free
Attachment 4	9. Heating-Unit Replacement in Manufactured Housing	Additional guidance indicating replacement gas furnaces shall “fit footprint of existing space and door should close fully.”