

## Appendix F: Summary Of Changes

### 2018 HOME ENERGY PLUS FURNACE PROGRAM MANUAL SUMMARY OF CHANGES

Changes effective October 1, 2017

	Section(s)	Topic	Revision	WX or WHEAP Related
1.	1	Introduction	<p><b>Revised to clarify:</b>  <b>Note:</b> The difference between Emergency and Non-Emergency Furnace Referrals are the time of year in which they are made and the response timelines. In both cases the furnace must be inoperable or unsafe at the time of the referral.</p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
2.	1.1(3) Also: 3.3	Overview	<p><b>Policy Change:</b>            Homes owned by a business (LLCs, Limited Partnerships, Corporations, etc.) are not eligible for Furnace Program services. Contact the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) prior to denying the referral request.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.	1.1(4g) Also: 1.1(5c) 3.5(6) 3.6.4(8)	Overview	<p><b>Policy Change:</b>            HE+ Furnace Program services may be deferred or denied for several different reasons including:</p> <ul style="list-style-type: none"> <li>The applicant did not reside in the home at the time the heating system failed or became unsafe.</li> </ul>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
4.	2.1	WHEAP Agency Response Requirements	<p><b>Revised to add:</b>  <b>Reminder:</b> The local WHEAP Agency is responsible for ensuring that applicants waiting for furnace services have temporary heat, can be provided temporary heat, or are able to relocate. The WHEAP Agency is responsible for ensuring the health and safety of the household.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
5.	2.1 7.2(7) Appx. D-1(15d)	WHEAP Agency Response Requirements	<p><b>Revised to add:</b>  <b>Note:</b> When entering initial furnace referral notes, the WHEAP worker shall include the following for each referral:</p> <ul style="list-style-type: none"> <li>Description of applicant's reported problem</li> <li>Type of proof used to verify ownership (excluding Wx-REFs)</li> <li>Details as to whether the household has temporary heat, can be provided temporary heat or are able to relocate, as well as what steps were taken to ensure the health and safety of the residents.</li> </ul>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

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6.	2.1 Also: 3.6.5(1)	WHEAP Agency Response Requirements	<p><b>Revised to clarify:</b>  <b>Note:</b> If the WHEAP Agency does not create a furnace referral due to the customer not meeting eligibility requirements, the WHEAP worker shall complete all the following steps:</p> <ul style="list-style-type: none"> <li>Notify the customer by phone, letter, or email that their request has been denied and explain the reason for the denial.</li> <li>Make system notes in the 'general' section detailing the customer's situation and why the referral was not made.</li> </ul>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
7.	2.2	Weatherization Agency Response Requirements: Non-Emergency furnace services	<p><b>Revised to add:</b>  <b>Note:</b> In the case of a delayed response (assessment conducted beyond 24-hour deadline or services completed after 72-hour deadline), the Weatherization Agency shall document in furnace system notes the reason for the delay and whether the household has temporary heat, can be provided temporary heat or are able to relocate, as well as what steps were taken to ensure the health and safety of the residents.</p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
8.	2.2 Also: 5.2.5(5)	Weatherization Agency Response Requirements: Non-Emergency furnace services	<p><b>Added to clarify:</b>  <b>Exception:</b> In the case of a Non-Emergency fuel switch, response requirements <b>do not</b> apply when a main and/or lateral is being extended.</p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
9.	3.1 Also: 6.3.1	WHEAP Eligibility for HE+Furnace Program Services	<p><b>Added WHEAP Policy Change</b>  <b>Reminder:</b> Households reporting zero income for two (2) consecutive years require an in-person application which shall be reviewed and approved by a supervisor/manager prior to submittal. HE+ system notes shall document name of supervisor/manager who approved the case as ready to be submitted. An explanation in HE+ system notes shall also include a description of how the household living expenses are being/have been paid.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

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10.	3.1(1)	Deceased Individual	<p><b>Added WHEAP Policy Change</b></p> <p><b>Note:</b> If the death of the case head or household member occurs after the date of application and before the application is extracted, the application is no longer valid and the application will deny because there is a deceased individual on the application. Any unextracted furnace applications will be systematically locked when the case head or household member has been marked deceased. The WHEAP Agency shall contact the HE+ Help Desk to unlock the furnace application and shall receive prior approval before processing the application. For additional guidance, please contact the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680).</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
11.	3.2	No Heat (applies to Emergency and Non-Emergency Furnace Referrals)	<p>A no-heat situation does <b>not</b> exist if:</p> <ul style="list-style-type: none"> <li>The furnace is not running due to electricity being disconnected or no fuel is available to run the furnace.</li> </ul>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
12.	3.4.1(2) Also: 3.4.2(1) 3.5(3f) 6.1.1(3) 7.2(2)	Rental Dwellings	<p><b>Policy Change:</b></p> <p><b>Note:</b> If the property owner does not claim rental income and/or does not file taxes, contact the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) for guidance.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
13.	3.5(5) Also: 3.6.4(7)	Dwelling and Structural Eligibility	<p><b>Policy Change:</b></p> <p>If a structure was originally designed and built for a use other than residential (e.g., manufacturing, commercial, worship) and has been converted to residential or is now being used as a residential building, the Weatherization Agency shall receive approval from the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) prior to proceeding with a furnace referral.</p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP

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14.	3.5(6)	Dwelling and Structural Eligibility	<p><b>Policy Change:</b></p> <p>If, after the assessment of a failed furnace, the Weatherization Agency or its subcontractor determines the heating system had not been in working condition prior to the customer's residency in the home, the Weatherization Agency shall receive approval from the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) <b>prior to proceeding with Furnace Program services.</b></p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
15.	3.6.1(1-3)	When to Defer or Deny Furnace Program Services	<p><b>Revised to add:</b></p> <p>The Division administers several housing programs that may be appropriate referral resources, including:</p> <ul style="list-style-type: none"> <li>• <a href="#">Community Development Block Grant (CDBG)- Small Cities Housing Program</a></li> <li>• <a href="#">CDBG-Housing Revolving Loan Fund Program</a></li> <li>• <a href="#">HOME Homebuyer and Rehabilitation Program</a></li> </ul>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
16.	3.6.4(6)	Denial of Furnace Program Services	<p><b>Revised to include adding notes in the system:</b></p> <p>Furnace Program services may be denied when:</p> <ul style="list-style-type: none"> <li>• Two or more <b>documented</b> appointments set by the grantee or contractor have been missed by the customer. Dates and times of appointments made and subsequently missed by the customer shall be added to furnace system notes.</li> </ul>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
17.	3.6.5(2)	Denial of Service Notification Requirements: Weatherization Agency Requirements	<p><b>Revised to clarify:</b></p> <p>If a dwelling/unit is determined ineligible for Furnace Program services during or after the initial assessment, the Weatherization Agency shall complete <b>all</b> of the following steps:</p> <ul style="list-style-type: none"> <li>• Cease the provision of services,</li> <li>• Send a denial letter to the customer with the reason for the denial,</li> <li>• Deny the referral in the HE+ system,</li> <li>• Invoice the job as 'assessment only' using the SFAS code,</li> <li>• Contact the WHEAP Agency to inform them of the denial,</li> </ul>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP

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			<ul style="list-style-type: none"> <li>Provide the WHEAP Agency with a copy of the denial letter,</li> <li>Make furnace system notes detailing the reason(s) for the denial.</li> </ul>	
18.	4.1(5)	Operational Procedures: General Responsibilities	<b>Added to clarify:</b> <b>Note:</b> For furnace replacements, the final invoice shall not be submitted in the HE+System until after the completion of the final inspection and any re-works or corrections.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
19.	4.1(10) Also: 5.1 5.2.2 5.2.4(7) 5.2.6(1)(2) Appx. B	Operational Procedures: General Responsibilities	<b>Revised to update location:</b> Attachment 4 – Technical Specifications for Weatherization and Home Energy Plus (HE+) Furnace Programs describes technical requirements and is available on the <a href="#">HE+ Procurement SharePoint</a> server.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
20.	4.1(12)	Operational Procedures: General Responsibilities	<b>Revised to add:</b> See Chapter 6 of the <a href="#">Weatherization Assistance Program Manual</a> for details on Procurement Management.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
21.	5.2.1(6) Also: 5.2.8(5) Appx A- Heating System Types	Repair or Replacement	<b>Revised to add:</b> <b>Note:</b> Portable, stand-alone space heaters and/or unvented space heaters are not eligible for repair or replacement through the HE+ Furnace Program.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
22.	5.2.5	Fuel Switches	<b>Revised to add:</b> A fuel switch shall be considered with all Furnace Program replacements.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
23.	5.2.5(1)	Fuel Switches	<b>Revised to clarify:</b> <b>Note:</b> If the primary furnace is working and safe the referring agency shall contact the HE+ Help Desk ( <a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) and request a waiver prior to completing a furnace referral.	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
24.	5.2.5(4)	Fuel Switches	<b>Revised to add:</b>	<input checked="" type="checkbox"/> WX

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			Switching of fuel types is allowed under the following circumstances: Natural gas is currently being used for other purposes within the home and it is feasible to install a kit to convert the existing LP furnace to natural gas as a repair.	<input checked="" type="checkbox"/> WHEAP
25.	5.2.5.1(1)	Additional Guidance on Fuel Switches	<b>Revised to add text from Fuel Switch policy:</b> Replacement or conversion of cook stoves, water heaters or dryers is not allowed with HE+ Furnace Program funds. If no other resources are available, the customer must arrange and pay for existing appliances to be replaced or converted to natural gas.	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
26.	5.2.5.1(2)	Additional Guidance on Fuel Switches	<b>Policy Change:</b> The maximum allowable expenditure for collateral activities associated with a fuel switch project is \$1,500. 1) These are costs that are related to fuel switching that are not part of the base bid price for installing a heating system. 2) Examples include oil tank capping or removal, gas lines, orifice replacement, and ductwork in electric to gas conversions. <b>Note:</b> <i>If the fuel switching collateral costs are estimated to exceed \$1,500 the agency shall contact the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) and receive approval from the Division prior to proceeding with the fuel switch.</i>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
27.	5.2.6 (5b)	Installation	<b>Revised to add:</b> The letter should make it clear that the household is responsible for scheduling the final inspection and <i>give the customer a ten-day deadline to schedule the inspection.</i>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
28.	5.2.6(5c)	Installation	<b>Revised to add:</b> Once the deadline has passed with no contact from the customer, the Weatherization operator should proceed to prepare and submit the invoice in the HE+ System for payment.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP

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29.	5.2.7(1a) Also: Appendix C	Collateral Activities	<b>Revised to add:</b> Heating System Replacement Checklists have been updated to include an area under the 'general' section for the contractor to indicate whether a building permit is required for the replacement job. If a permit is required, the contractor shall check the box. Leaving the box unchecked indicates a permit is not required from the municipality. Heating System Replacement Checklists are available on the <a href="#">HE+ website</a> and shown as example Appendix C.	<input checked="" type="checkbox"/> <b>WX</b> <input type="checkbox"/> <b>WHEAP</b>
30.	6.2.1(3b)	Weatherization Agency Furnace File Documentation: Emergency and Non-Emergency Furnace Referrals	<b>Updated to add:</b> For replacements: copy of building permit(s), if required by local government. If a permit is not issued by the local jurisdiction, then a copy of the receipt for payment is acceptable documentation.	<input checked="" type="checkbox"/> <b>WX</b> <input type="checkbox"/> <b>WHEAP</b>
31.	6.3.1	WHEAP Agency FQA Requirements	<b>Updated to add:</b> <b>Note:</b> The WHEAP worker reviewing the file shall also review the original or "parent" HE+ application associated with the file to ensure that eligibility and benefits were accurately determined.	<input type="checkbox"/> <b>WX</b> <input checked="" type="checkbox"/> <b>WHEAP</b>
32.	6.3.2(1)	Weatherization Agency FQA Requirements	<b>Policy Change to increase number of repair files to review:</b> Weatherization agencies shall ensure the internal FQA is conducted twice per program year: in January for October to December activity and again in May for January to April activity. All activity shall use the HE+ Furnace Quality Assurance tool, and include an annual minimum of: 1) Five repair files, or 5% of the total repair files (whichever is greater).	<input checked="" type="checkbox"/> <b>WX</b> <input type="checkbox"/> <b>WHEAP</b>
33.	6.3.2(2b)	Weatherization Agency FQA Requirements	<b>Update to add:</b> The FQA review tool submitted to the Division upon request must be on the Excel document provided by DEHCR.	<input checked="" type="checkbox"/> <b>WX</b> <input type="checkbox"/> <b>WHEAP</b>



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34.	6.3.2(3)	Weatherization Agency FQA Requirements	<b>Update to add:</b> <b>Note:</b> A revised Furnace Quality Assurance Tool for Weatherization Agencies is available on the <a href="#">HE+ website</a> and shown as an example in <a href="#">Appendix E</a> .	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
35.	7	Processing Furnace Program Requests	<b>Formatting:</b> Chapter 7 has been reformatted for clarity and step-by-step HE+ System Data Entry instructions for each process are in Appendix D.	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
36.	7.2	WHEAP Agency: Generating a Furnace Referrals and Reserving Funds	<b>Revision:</b> WHEAP workers are no longer required to enter the estimated age of the heating system in furnace system notes.	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
37.	7.3.2	Weatherization Agency: Updating and Costing Furnace Referrals	<b>Updated to add:</b> The Weatherization Agency shall acknowledge receiving a new furnace referral by clicking “Update Furnace” in the HE+ System within <b>three business days</b> of the referral appearing in the “New Furnace Referrals” inbox.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
38.	7.3.3(3) Also Appx. D-3(17)	Weatherization Agency: Invoicing Furnace Jobs	<b>Added to clarify:</b> <b>Note:</b> A cost override will not be issued by the Division until a “Service Date” has been entered and “Ready for Invoice” has been checked.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
39.	8.5	Furnace Program Support	<b>Updated to add:</b> Support labor includes costs for staff directly managing Furnace Program activities and program staff. Agencies shall not include administrative, human resources, finance and clerical staff costs without prior written approval from the Division.	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
40.	8.5(3)	Furnace Program Support	<b>Updated to add as allowable Program Support expenses:</b> Direct supervision of Furnace Program staff by the HE+ Program Manager and/or Director	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
41.	8.5.1	Payment Bonds	<b>Policy Change:</b>	<input checked="" type="checkbox"/> WX



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			Payment bonds are required for all weatherization and HE+ Furnace Program services contracts exceeding \$149,999 annually and where wholesaler or subcontractor partnerships are utilized to deliver services. (Please see entire section).	<input type="checkbox"/> WHEAP
42.	Appendix A	Definitions	<p><b>Revised to clarify:</b>  <b><u>Assessment</u></b>            A visual inspection (with testing as needed) of a heating system in response to a Furnace Program referral to evaluate the need for repair or replacement of the system. The assessment shall take into account the functionality and condition of the heating system.</p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
43.	Appendix A	Definitions	<p><b>Revised to clarify:</b>  <b><u>Denial Of Service</u></b>            A refusal of Furnace Program services due to a dwelling not being eligible or other policy-related issues (see <a href="#">Section 3.6</a>). If the situation is resolved at a later date and the customer still remains WHEAP eligible a new furnace referral shall be created by the WHEAP Agency.</p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP