

**2020 HOME ENERGY PLUS FURNACE PROGRAM MANUAL
SUMMARY OF CHANGES**

Chapter (1st mention)	Topic	Revision/Update/Clarification	WX or WHEAP Focus
2.1.4.1	System Notes	<p>When entering initial referral notes for HE+ Furnace Program Services, the WHEAP worker shall include the following for each referral:</p> <p>1) Emergency and Non-Emergency Referrals</p> <ul style="list-style-type: none"> • Description of applicant’s reported problem, • Type of proof used to verify homeownership, • 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, • The WHEAP worker shall ask the customer the following questions and document the answers in HE+ Furnace Program application system notes: <ul style="list-style-type: none"> ○ Is there any moisture in the area where the heating system is located? ○ Is there a clear path to the heating system? ○ Is there anything in the home that may prevent the contractor from assessing the heating system? <p>Note: <i>If the customer answers ‘yes’ to any question the WHEAP worker shall include the customer’s detailed explanation in system notes.</i></p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
2.1.4.2	System Notes	<p>2) Weatherization Referrals</p> <ul style="list-style-type: none"> • Name of Weatherization Agency worker who made the referral. <p>Reminder: For any rental dwelling HE+ Furnace Program referrals, the WHEAP agency must include in the initial system notes that the property owner is WHEAP eligible and tax forms were used to verify rental income. See Chapter 3.4 for more information on rental dwelling requirements.</p> <p>Note: <i>When entering HE+ Furnace Program referral notes in the system, the WHEAP worker is reminded that the most recently saved note is the only text included in the furnace referral email to the Weatherization Agency.</i></p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.1.1	HE+ System Eligibility Determination	<p>Note: <i>Verification of homeownership must be obtained each time HE+ Furnace Program services are requested. Verification documentation provided before the customer has reported a heating system problem may not be used. All verification of homeownership documentation must show that a member of the household is the current homeowner (in the current program year). For rental referrals, the owner of the rental property must also be WHEAP eligible in the current program year with a complete HE+ application and a copy of their income taxes on file. (See Chapter 3.4).</i></p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

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3.3.1.1	Mobile or Manufactured Homeownership Verification	<p>If the dwelling is a mobile or manufactured home, a certificate of title issued by the Department of Safety and Professional Services is the preferred proof of homeownership. The documentation shall show that a household member is the current owner.</p> <p>Depending on your customer's situation, use the appropriate resources below to obtain verification of homeownership for mobile or manufactured homes:</p> <ol style="list-style-type: none"> 1) The customer owns the mobile home but cannot provide the title: <ol style="list-style-type: none"> a. Use the Department of Safety and Professional Services (DSPS) Electronic Safety and Licensing Application (eSLA) website to search for current homeownership if the customer has a title but cannot provide a copy of the title: https://esla.wi.gov/PortalCommunityLogin b. First time eSLA users will need to create an account with a secure password c. Follow the instructions on the site to conduct a search. <ol style="list-style-type: none"> i. If the correct unit is in the database with the applicant shown as the owner and the status is listed as either 'Active' or 'Submitted', print a copy to put in the file. ii. If the unit is not in the database, call (608) 266-2112 or email DspsSbManfHomes@wi.gov and request assistance from DSPS staff. 	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.3.1.3	Mobile or Manufactured Homeownership Verification	<ol style="list-style-type: none"> 3) If a customer resides in a mobile or manufactured home that is in a mobile home park or community (not on private property) and does not have a Certificate of Title, the agency is encouraged to work with the customer to obtain a title by completing the following steps: <ol style="list-style-type: none"> a. Log in to the DSPS eSLA website at: esla.wi.gov, b. With the customer's assistance, complete the 'Eligibility', 'Personal Information' and 'Manufactured Home Information' sections. c. Follow the steps to submit the application. d. Inform the customer that it is their responsibility to provide the WHEAP Agency with a copy of the title as soon as they receive it from DSPS and that failure to do so could result in the denial of future HE+ Furnace Program services, e. Make notes in the HE+ Furnace Program system that detail the transaction. 	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

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3.3.2	Tribal Homeownership	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: center;">Tribal Homeownership Verification</th> </tr> <tr> <th style="text-align: center;">Tribal Dwelling Type</th> <th style="text-align: center;">Acceptable* Tribal Homeownership Verification</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Single Family Home</td> <td> <ol style="list-style-type: none"> 1. Tribal Land Lease that names the lessee as a member of the household. 2. Property tax records that name a household member as responsible for the taxes at the address listed on the HE+ Application. 3. Tribal Attestation of Homeownership form. The form is available on the HE+ website under "Furnace Program Documents." The verification form must be signed and dated by a tribal official. The title and contact information of the tribal official who signed the paperwork shall also be noted in HE+ Furnace Program system notes. <p><i>Note: A Quit Claim Deed alone is not sufficient.</i></p> </td> </tr> <tr> <td style="vertical-align: top;">Rental Dwellings</td> <td> <ul style="list-style-type: none"> • Verify the ownership of the dwelling with one of the documents listed above. • Refer to Chapter 3.4.1 and Chapter 3.4.2 for rental eligibility requirements. </td> </tr> <tr> <td style="vertical-align: top;">Mobile or Manufactured Home</td> <td> <ol style="list-style-type: none"> 1. Mobile Home Title with a household member's name as owner. See Chapter 3.3.1 for assistance in searching for the customer's title. 2. A Bill of Sale, or a copy of the Homeowner's Insurance, where the document provided identifies a household member's name as the dwelling owner and describes the dwelling (e.g. serial number, make and year). 3. Property tax records that names a household member as responsible for the taxes at the address listed on the HE+ Application. 4. Tribal Attestation of Homeownership form. The form is available on the HE+ website under "Furnace Program Documents." The verification form must be signed and dated by a tribal official. The title and contact information of the tribal official who signed the paperwork shall also be noted in HE+ Furnace Program system notes. </td> </tr> </tbody> </table>	Tribal Homeownership Verification		Tribal Dwelling Type	Acceptable* Tribal Homeownership Verification	Single Family Home	<ol style="list-style-type: none"> 1. Tribal Land Lease that names the lessee as a member of the household. 2. Property tax records that name a household member as responsible for the taxes at the address listed on the HE+ Application. 3. Tribal Attestation of Homeownership form. The form is available on the HE+ website under "Furnace Program Documents." The verification form must be signed and dated by a tribal official. The title and contact information of the tribal official who signed the paperwork shall also be noted in HE+ Furnace Program system notes. <p><i>Note: A Quit Claim Deed alone is not sufficient.</i></p>	Rental Dwellings	<ul style="list-style-type: none"> • Verify the ownership of the dwelling with one of the documents listed above. • Refer to Chapter 3.4.1 and Chapter 3.4.2 for rental eligibility requirements. 	Mobile or Manufactured Home	<ol style="list-style-type: none"> 1. Mobile Home Title with a household member's name as owner. See Chapter 3.3.1 for assistance in searching for the customer's title. 2. A Bill of Sale, or a copy of the Homeowner's Insurance, where the document provided identifies a household member's name as the dwelling owner and describes the dwelling (e.g. serial number, make and year). 3. Property tax records that names a household member as responsible for the taxes at the address listed on the HE+ Application. 4. Tribal Attestation of Homeownership form. The form is available on the HE+ website under "Furnace Program Documents." The verification form must be signed and dated by a tribal official. The title and contact information of the tribal official who signed the paperwork shall also be noted in HE+ Furnace Program system notes. 	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
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3.4	Rental Units	<ol style="list-style-type: none"> 4) Rental income received by the landlord must be verified by tax records. <ol style="list-style-type: none"> a. Property owner must provide a copy of their most recent tax return including Tax Form 1040 and supporting Schedules. b. If rental income is not verified by income taxes for the homeowner or dwelling owner, the homeowner, including the rental unit, is not eligible for a furnace referral. 	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP										
3.5.2	Dwelling and Structural Eligibility	<ol style="list-style-type: none"> 2) WHEAP eligible applicants that have a heating system damaged by flood, fire or natural disaster needing repair or replacement can be referred for HE+ Furnace Program services if the eligible applicant does not have insurance coverage that will address any needed repair or replacement and assistance from other federal, state or local funding sources is not available. <ol style="list-style-type: none"> a. Before replacing a heating system that has been incapacitated due to flooding, the Weatherization agency or its subcontractor 	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP										

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		<p>shall provide an estimated cost of moving the heating system to an area in the home protected from flooding.</p> <p>b. If it is not possible to relocate the heating system out of a flood prone area of the home, the agency shall contact the HE+ Help Desk (heat@wisconsin.gov or 608-267-3680) for guidance prior to replacing the heating system.</p>	
3.5.2	Dwelling and Structural Eligibility	<p>Note: HE+ Furnace Program funds cannot be used to pay customer's insurance deductibles.</p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.6.4	Denial of HE+ Furnace Program Services	<p>HE+ Furnace Program services shall be denied when:</p> <ul style="list-style-type: none"> • The household has adequate resources (or assets) to address the heating system failure. <ul style="list-style-type: none"> ○ The HE+ Program does not have a vehicle or asset limit test for eligibility. While regular benefits lack an asset test, assets may be considered in deciding HE+ Furnace Program services, including assets of landlord. • Contact the HE+ Help Desk (heat@wisconsin.gov or 608-267-3680) prior to denying services. 	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.6.5	Denial of HE+ Furnace Program Services: Notification Requirements	<p>Note: If the WHEAP worker generates a furnace referral that is denied in the system for any reason, the WHEAP worker shall immediately contact the Weatherization Agency to inform them the referral has been denied. The WHEAP worker shall update system notes to include who they spoke with at the WX Agency about the denial. Denial of services notifications listed above still apply.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
5.2.5	Primary Fuel Switch	<p>A primary fuel switch shall be considered with all HE+ Furnace Program replacements. Any fuel switch to natural gas shall first be reviewed for possible Weatherization.</p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP