

# 2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES

## DRAFT

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
1.1.7	Overview	<p><b>Added:</b></p> <p>7) The local WHEAP Agency is responsible for verifying WHEAP eligibility <b>and uploading homeownership documentation</b> prior to referring a household to the Weatherization Agency for Emergency and Non-Emergency HE+ Furnace Program assistance.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
1.1.8	Overview	<p><b>Added:</b></p> <p><b>Reminder:</b> The Weatherization Agency is responsible for verifying and <b>uploading homeownership documentation</b> for a Weatherization Referral.</p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
2.1.4.3	System Notes	<p><b>Added:</b></p> <ul style="list-style-type: none"> <li>If the homeowner or dwelling owner of the rental unit does not file taxes please contact the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680).</li> </ul>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.1	WHEAP Eligibility	<p><b>Current:</b></p> <p><b><u>3.1 WHEAP Eligibility for HE+ Furnace Program Services</u></b></p> <p>The household shall meet the financial and non-financial eligibility requirements for WHEAP benefits. WHEAP Agencies shall ensure that proof of WHEAP program eligibility (signed certification page) <b>has been uploaded into the HE+ System.</b></p> <p><b>Added:</b></p> <p><b>Note:</b> Online applications do not have a physical Certification Page. When online application customers apply, they are provided with the Certification Page language prior to submission.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.1	WHEAP Eligibility	<p><b>Revised to Add:</b></p> <p>WHEAP agencies may be responsible for repayment of HE+ Furnace Program services if:</p> <ul style="list-style-type: none"> <li>Homeownership is not verified in compliance with HE+ Furnace Program policy (excluding Wx-REFs).</li> <li>HE+ Furnace Program services are completed before the household's HE+ Furnace Program eligibility has been determined in compliance with policy.</li> <li>HE+ Furnace Program referral email is generated on a denied application (for example: when program funds have been exhausted).</li> </ul> <p>If the WHEAP Agency becomes aware that any of the above actions has occurred, the WHEAP worker shall <b>immediately</b> contact the Weatherization Agency to inform them.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

# 2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES

## DRAFT

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
		The household shall not be held responsible for repayment in the above circumstances and program funds may not be utilized for these repayments.	
3.1.1	HE+ System Eligibility	<p><b>Current:</b></p> <p>When entering data in the HE+ Furnace Program application, the system will calculate eligibility based on the prior <i>three</i> months' income. If a household is ineligible based on three months' income, the HE+ System uses the previous month's income to determine the applicant's eligibility.</p> <p><b>Revised:</b></p> <p>When entering data in the HE+ Furnace Program application, the system will calculate eligibility based on the prior (<b>one</b>) month's income.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.2	No-Heat Referrals	<p><b>Revised to Add:</b></p> <p><b>Note:</b> A household is considered to be in a no-heat situation when the <b>primary</b> heating system is not working or is unsafe to operate (e.g., leaking carbon monoxide (CO) into the living space, flames rolling out of the firebox, or similar problems).</p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.3.1	Home-ownership	<p><b>Added:</b></p> <p><b><u>3.3.1 Homeownership Verification</u></b></p> <p><b>Verification of ownership obtained from the appropriate county online tax portal is the preferred proof of homeownership.</b></p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.3.2	Mobile or Manufactured Homeownership Verification	<p><b>Added:</b></p> <p><b><u>3.3.2 Mobile or Manufactured Homeownership Verification</u></b></p> <p>If the dwelling is a mobile or manufactured home, <b>a certificate of title issued by the Department of Safety and Professional Services is the preferred proof of homeownership.</b> The documentation shall show that a household member is the current owner.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.3.2	Mobile or Manufactured Homeownership Verification	<p><b>Revised:</b></p> <p>Depending on the customer's situation, WHEAP agencies should use the appropriate resources below to obtain verification of homeownership for mobile or manufactured homes:</p> <p>1) The customer owns the mobile home but cannot provide the title:</p> <p>a. Use the Department of Safety and Professional Services (DSPS) Electronic Safety and Licensing Application (eSLA) website to search for current homeownership:  <a href="https://esla.wi.gov/PortalCommunityLogin">https://esla.wi.gov/PortalCommunityLogin</a></p> <p>b. <b>Click on 'Public Lookup' on the action ribbon, then click 'Title' to begin a search</b></p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

**2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES**

**DRAFT**

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
		<ul style="list-style-type: none"> <li>i. If the correct home is in the database with a household member shown as the owner and the status is listed as either 'Active' or 'Submitted', upload a copy into the HE+ System and proceed with the referral.</li> <li>ii. If the correct home is not in the database, proceed to section 3.3.1.3</li> <li>c. The customer's mobile or manufactured home is located on <b>private property</b>:               <ul style="list-style-type: none"> <li>i. Mobile or manufactured homes on private property are not required to be titled according to State of Wisconsin law.</li> </ul> </li> <li>d. If a customer resides in a mobile or manufactured home that is on private property and does not have a certificate of title, the customer must provide documentation that identifies a household member's name as the owner of the property associated with the address listed on the HE+ Application. A copy of verification of ownership obtained from the appropriate county online tax portal is the preferred method of proof. <b>Verification of ownership obtained from the appropriate county online tax portal is the preferred proof of property ownership.</b></li> <li>e. If a customer resides in a mobile or manufactured home that is in a <b>mobile home park or community</b> (not on private property) and does not have a Certificate of Title, the WHEAP agency <b>shall</b> work with the customer to obtain a title by completing the following steps:               <ul style="list-style-type: none"> <li>a. Access the DSPS website at: <a href="https://dsps.wi.gov/Pages/Programs/MH/Default.aspx">https://dsps.wi.gov/Pages/Programs/MH/Default.aspx</a></li> <li>b. Download and print out the appropriate form</li> <li>c. Complete the appropriate form with the customer's assistance</li> <li>d. Have the customer provide you with a check or money order for the processing fee</li> <li>e. The WHEAP worker shall stamp and address the envelope to:</li> <li>f. Wisconsin Department of Safety and Professional Services PO Box 8935 Madison, WI 53708-8935</li> <li>g. 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</li> <li>h. Enter HE+ System Furnace notes that detail the transaction</li> <li>i. Once the WHEAP worker has ensured the mailing of the Certificate of Title application and appropriate payment from their office, the HE+ Furnace Program referral can be generated.</li> </ul> </li> </ul> <p>If an agency is unable to verify mobile or manufactured homeownership utilizing one of the above methods, contact the HE+ Help Desk</p>	

**2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES**

**DRAFT**

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
		( <a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) <b>prior</b> to making the referral for HE+ Furnace Program services.	
3.3.2	Mobile or Manufactured Homeownership Verification	<p><b>Added:</b></p> <p><b>Note:</b> Failure to complete all of the above steps prior to generating the HE+ Furnace Program referral could result in the WHEAP agency being assessed with the costs associated with the repair or replacement.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.3.3	Tribal Homeownership-Mobile or Manufactured Home	<p><b>Current:</b></p> <p><b>A Bill of Sale</b>, 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).</p> <p><b>Revised:</b></p> <p>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). <b>Homeowner’s insurance statement must be current.</b></p> <p>Eliminating ‘<b>bill of sale</b>’ as an approved form of verification.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.4.2	Rentals	<p><b>Revised:</b></p> <p><b>The WHEAP worker must confirm that copies of the property owner’s signed certification page, homeownership record and tax forms have been uploaded in the HE+System.</b></p> <p>i. If the property owner resides in a different county/tribe, the worker must verify that the property owner’s signed certification page, homeownership record and tax forms have been <b>uploaded to the HE+ System.</b></p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.6.3	Deferral Documentation Requirements	<p><b>Revised to Add:</b></p> <p>a. Pictures documenting the reason for deferral (mold or other problems) are required and <b>shall be uploaded into the HE+System.</b></p> <p>b. Copy of notification letter sent to customer <b>shall be uploaded into the HE+ System</b></p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
3.6.4	Denial of services	<p><b>Current:</b></p> <p>HE+ Furnace Program services shall be denied when:</p> <p>The applicant has altered the operation of the heating system or has mistreated the heating system so that the warranty is void.</p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

**2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES**

**DRAFT**

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
		<p><b>Revised:</b></p> <p>The applicant has altered the operation of the heating system causing the failure.</p> <ul style="list-style-type: none"> <li>o Contact the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) prior to denying services.</li> </ul>	
3.6.5	Denial of Services Notification	<p><b>Revised to Add:</b></p> <p><b>WHEAP Agency Requirements</b></p> <p>A copy of the letter shall be uploaded into the HE+System</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
3.6.5	Denial of Services Notification	<p><b>Current:</b></p> <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 with spoke with at the WX Agency about the denial. Denial of services notifications listed above still apply</p> <p><b>Revised:</b></p> <p><b>Note:</b> If the WHEAP worker generates a furnace referral email to the Weatherization Agency that is denied due to lack of funds, 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 with spoke with at the WX Agency about the denial. Denial of services notifications listed above still apply. <b>Failure to do so may result in the WHEAP agency being assessed with the costs associated with the referral.</b></p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
4.1.1	General Responsibilities	<p><b>Revised to Add:</b></p> <p>1) A Furnace Program Contact Information Form shall be completed by the local WHEAP Agency and the local Weatherization Agency detailing contact information and responsibilities assigned to the two agencies (or programs when housed within one agency) regarding the HE+ Furnace Program. Agencies shall use the form provided by DEHCR. The Weatherization Agency shall collect the information annually and upload the document into the HE+System by October 1st each year. The Contact Information Form is located on the <a href="#">HE+ website</a> under “HE+ Furnace Program Documents”.</p> <p><b>Note:</b> An updated Furnace Program Contact Information Form shall be uploaded into the HE+System whenever a change has been made to any of the information contained in the document. The Weatherization Agency shall upload the updated form and alert the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680) of the new document.</p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

**2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES**

**DRAFT**

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
4.1.7	General Responsibilities	<p><b>Current:</b></p> <p>7) The Weatherization Agency shall complete the final inspection of each heating system replacement within two weeks of the installation.</p> <ul style="list-style-type: none"> <li>• Agencies with a tiered inspection process are required to submit their inspection plan to the division for approval prior to implementing.</li> </ul> <p><b>Revised:</b></p> <p>7) The Weatherization Agency shall complete the final inspection of each heating system replacement within two weeks of the installation.</p> <ul style="list-style-type: none"> <li>• Tiered inspection plans are no longer allowed.</li> </ul>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
4.1.10	General Responsibilities	<p><b>Current:</b></p> <p>10) Attachment 4 – Technical Specifications for Weatherization and Home Energy Plus (HE+) Furnace Programs describes technical requirements and is available on the HE+ Procurement SharePoint server.</p> <p><b>Revised:</b></p> <p>10) Attachment 4 – Technical Specifications for Weatherization and Home Energy Plus (HE+) Furnace Programs describes technical requirements and is available on the HE+ Training and Technical Assistance website under Technical Assistance, WX Procurement, Category 6, Attachment 4 Specifications.</p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
4.1.15	General Responsibilities	<p><b>Added:</b></p> <p>15) If a Non-Emergency Referral occurs in late August or September and the furnace service work and invoicing will not be completed prior the deadline for completion of the current program year work, the Weatherization Agency shall deny the referral and charge for any applicable assessment fees. The Weatherization Agency shall also notify the WHEAP Agency of the denial.</p> <ul style="list-style-type: none"> <li>• The WHEAP Agency shall contact the customer to assist them in completing an early application for the subsequent program year and, if the customer remains eligible, generate the HE+ Furnace Program referral on or after October 1<sup>st</sup>.</li> <li>• System notes shall be entered by the Weatherization Agency explaining the timeline of events.</li> </ul>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP

**2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES**

**DRAFT**

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus																																																
5.2	Service Guidelines	<p><b>Current:</b></p> <table border="1"> <thead> <tr> <th colspan="3">HE+ Furnace Program System Type Repair/Replace Cost Limits</th> </tr> <tr> <th>System Type</th> <th>Repair Max</th> <th>Replacement Max</th> </tr> </thead> <tbody> <tr> <td>Forced Air</td> <td>\$750</td> <td>\$6,000</td> </tr> <tr> <td>Hot Water Boiler</td> <td>\$1,000</td> <td>\$8,500</td> </tr> <tr> <td>Steam Boiler</td> <td>\$1,000</td> <td>\$8,500</td> </tr> <tr> <td>Room/Space Heater*</td> <td>\$750</td> <td>\$5,000</td> </tr> <tr> <td>Wall Furnace</td> <td>\$750</td> <td>\$5,000</td> </tr> <tr> <td>Other</td> <td>\$1,000</td> <td>\$5,000</td> </tr> </tbody> </table> <p><b>Revised:</b></p> <table border="1"> <thead> <tr> <th colspan="3">HE+ Furnace Program System Type Repair/Replace Cost Limits</th> </tr> <tr> <th>System Type</th> <th>Repair Max</th> <th>Replacement Max</th> </tr> </thead> <tbody> <tr> <td>Forced Air</td> <td>\$1,000</td> <td>\$7,500</td> </tr> <tr> <td>Hot Water Boiler</td> <td>\$1,500</td> <td>\$10,000</td> </tr> <tr> <td>Steam Boiler</td> <td>\$1,500</td> <td>\$10,000</td> </tr> <tr> <td>Room/Space Heater*</td> <td>\$1,000</td> <td>\$6,000</td> </tr> <tr> <td>Wall Furnace</td> <td>\$1,000</td> <td>\$6,000</td> </tr> <tr> <td>Other</td> <td>\$1,000</td> <td>\$6,000</td> </tr> </tbody> </table>	HE+ Furnace Program System Type Repair/Replace Cost Limits			System Type	Repair Max	Replacement Max	Forced Air	\$750	\$6,000	Hot Water Boiler	\$1,000	\$8,500	Steam Boiler	\$1,000	\$8,500	Room/Space Heater*	\$750	\$5,000	Wall Furnace	\$750	\$5,000	Other	\$1,000	\$5,000	HE+ Furnace Program System Type Repair/Replace Cost Limits			System Type	Repair Max	Replacement Max	Forced Air	\$1,000	\$7,500	Hot Water Boiler	\$1,500	\$10,000	Steam Boiler	\$1,500	\$10,000	Room/Space Heater*	\$1,000	\$6,000	Wall Furnace	\$1,000	\$6,000	Other	\$1,000	\$6,000	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
HE+ Furnace Program System Type Repair/Replace Cost Limits																																																			
System Type	Repair Max	Replacement Max																																																	
Forced Air	\$750	\$6,000																																																	
Hot Water Boiler	\$1,000	\$8,500																																																	
Steam Boiler	\$1,000	\$8,500																																																	
Room/Space Heater*	\$750	\$5,000																																																	
Wall Furnace	\$750	\$5,000																																																	
Other	\$1,000	\$5,000																																																	
HE+ Furnace Program System Type Repair/Replace Cost Limits																																																			
System Type	Repair Max	Replacement Max																																																	
Forced Air	\$1,000	\$7,500																																																	
Hot Water Boiler	\$1,500	\$10,000																																																	
Steam Boiler	\$1,500	\$10,000																																																	
Room/Space Heater*	\$1,000	\$6,000																																																	
Wall Furnace	\$1,000	\$6,000																																																	
Other	\$1,000	\$6,000																																																	
5.2.4	Heating System Replacements	<p><b>Revised to Add:</b></p> <p>1) The household shall be experiencing a no-heat situation because the <b>primary</b> heating system is inoperable or unsafe.</p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP																																																
5.2.6.4	Heating System Installation Guidelines	<p><b>Revised to Add:</b></p> <p>4) The Weatherization Agency, or its subcontractor, shall provide the fully completed Replacement Furnace (or Boiler) Check List located on the <a href="#">Home Energy Plus website</a> under “Field Forms”, “Required Forms.” <b>A copy of the checklist shall be uploaded in the HE+ System.</b></p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP																																																
5.2.6	Heating System Installation Guidelines	<p><b>Added:</b></p> <p><b>Note:</b> <i>If the final inspection cannot be performed for any reason, the Weatherization Agency shall contact the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a> or 608-267-3680).</i></p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP																																																
6	File Documentation and Uploads	<p><b>Added:</b></p> <p>Refer to HE+ Program policies (Chapter 2.2.5 of the PY2021 Weatherization Program Manual or Chapter 8.5.3 of the PY 2021 WHEAP Operations Manual) to determine the document retention and applicant confidentiality requirements for HE+ Furnace Program files. <b>Document upload requirements associated with HE+ Furnace Program referrals originated by the Weatherization Agency shall follow Weatherization</b></p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP																																																

# 2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES

## DRAFT

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
		record retention policies and HE+ Furnace Program referrals originated by the WHEAP Agency shall follow WHEAP record retention policies.	
6.2.1	WX Agency File Documentation	<p><b>Revised to Add:</b></p> <p><b>6.2.1 All HE+ Furnace Program Referrals</b></p> <p>The following documents shall be uploaded into the HE+ System where applicable:</p> <ol style="list-style-type: none"> <li>1) Copy of the contractor's itemized invoice(s).</li> <li>2) Photographs documenting the existing heating system conditions, manufacturer's name plate, and any other necessary documents indicating the problem or condition of the existing heating system <b>prior</b> to the provision of services.</li> <li>3) For replacements, the following shall be uploaded into the HE+ System. <ul style="list-style-type: none"> <li>• Copy of the appropriate heating system checklist fully completed by the contractor.</li> <li><i><b>Note:</b> It is the Weatherization Agency's responsibility to ensure the most recent heating system checklist is being used. Check the <a href="#">HE+ website</a> for updated forms.</i></li> <li>• Copy of the fully completed final inspection report conducted by the Weatherization Agency or it's subcontractor.</li> <li>• Copy of building permit(s), if required by local government. <ul style="list-style-type: none"> <li>○ If a paper permit is not issued by the local jurisdiction, then a copy of the receipt for payment is acceptable documentation.</li> </ul> </li> <li>• Copy of the HE+ Furnace Program Customer Agreement form signed and dated by an adult (18 or older) applicant household member and the sub-contractor, or the subcontractor's authorized representative.</li> <li>• Copy of the sizing calculations.</li> <li>• For deferrals or denials: a copy of the Weatherization Agency's letter of deferral/denial sent to customer.</li> </ul> </li> </ol>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP
6.3.1	WHEAP Agency FQA Requirements	<p><b>Revised to Add:</b></p> <p>Upon request by an employee of the Division or a Division-authorized representative, the WHEAP Agency shall produce all the following:</p> <ol style="list-style-type: none"> <li>1) Additional documents retained by WHEAP but not uploaded into the HE+System.</li> <li>2) The completed FQA review tool. <ol style="list-style-type: none"> <li>a. The FQA tool shall identify the furnace file components reviewed, the results and the follow-up activities performed to bring the file into compliance with the WHEAP Policy requirements (when applicable).</li> </ol> </li> </ol>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
6.3.2	WX Agency FQA Requirements	<p><b>New:</b></p> <p>Furnace Quality Assurance reviews will be conducted randomly throughout the year by DEHCR staff through a desktop review</p>	<input checked="" type="checkbox"/> WX <input type="checkbox"/> WHEAP

**2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES**

**DRAFT**

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
7.2	WHEAP Agency: Generating and reserving funds	<p><b><u>New:</u></b></p> <p>The WHEAP worker should review all previous HE+ Furnace Program referral notes in the system. If the customer has been denied in the past by the Weatherization Agency for any reason, the WHEAP worker shall contact the Weatherization Agency to discuss the referral.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
7.2	WHEAP Agency: Generating and Reserving Funds	<p><b><u>Current:</u></b></p> <p>If an applicant has moved, consider taking a new HE+ application to determine the new residence’s weatherization eligibility and to create a new referral for weatherization at the new residence.</p> <p><b><u>Revised:</u></b></p> <p>If an applicant has moved and is interested in Weatherization at their new location, consider taking a new HE+ application to determine the new residence’s weatherization eligibility and to create a new referral for weatherization at the new residence.</p>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
7.2	WHEAP Agency: Generating and reserving funds	<p><b><u>Added:</u></b></p> <p><b><u>7.2 WHEAP Agency: Generating Referrals and Reserving Funds</u></b></p> <p>HE+ Furnace Program referrals shall be generated by the WHEAP Agency within 48 hours of the initial request during the heating season (October 1- May 15) and within five business days of the initial request from May 16- September 30. If the situation is potentially life-threatening the WHEAP Agency shall complete the referral (and reservation of funds) within 18 hours (see <a href="#">Chapter 2.1</a> for WHEAP Agency Response Requirements).</p> <p><b><u>Reminders:</u></b></p> <p>The WHEAP worker should review all previous HE+ Furnace Program referral notes in the system. If the customer has been denied in the past by the Weatherization Agency, the WHEAP worker shall contact the Weatherization Agency to discuss the referral.</p>	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP
7.2	WHEAP Agency: Generating and reserving funds	<p><b><u>Added:</u></b></p> <p>When entering an HE+Furnace Program application into the system, the WHEAP worker shall click “Save” before checking “Ready for Referral”. Once the application is “saved” and no system denial messages are provided to the WHEAP worker, the worker may select the “Ready for Referral” checkbox.</p> <ul style="list-style-type: none"> <li>○ Furnace applications must be “saved” prior to making a referral in all cases. The WHEAP agency may be responsible for any expenses incurred by making referrals on Denied furnace applications.</li> </ul>	<input type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP

# 2021 HE+ FURNACE PROGRAM MANUAL-SUMMARY OF CHANGES

## DRAFT

Changes effective October 1, 2020

Chapter	Topic	Revision/Update/Clarification	WX or WHEAP Focus
8.5.4	Heating System Replacements	<b><u>Revised to Add:</u></b> 1) The household shall be experiencing a no-heat situation because the <b>primary</b> heating system is inoperable or unsafe.	<input checked="" type="checkbox"/> WX <input checked="" type="checkbox"/> WHEAP