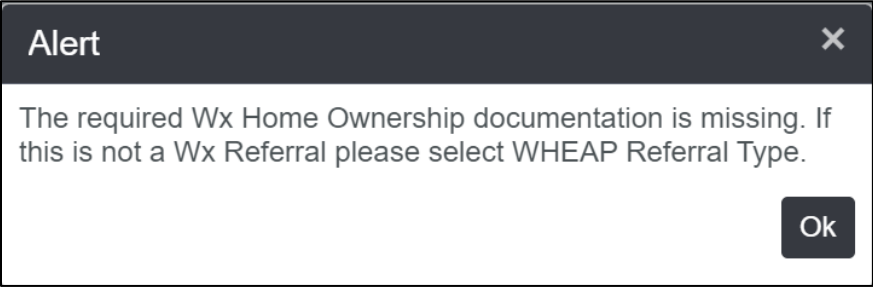


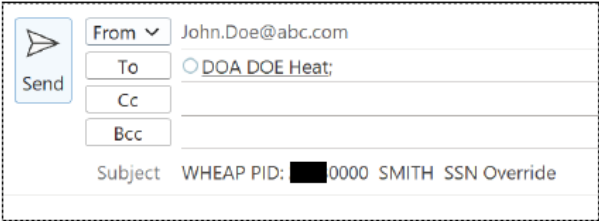
# HE+ Program Services PY25 Summary of Policy Changes

Below is a quick reference guide summarizing key changes made to the PY25 HE+ Program Services 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 PY25 HE+ Program Services Manual. Changes in policy are highlighted in yellow.

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/Wx)
1.1	<ul style="list-style-type: none"> <li>HVAC-All</li> </ul>	Eligibility	<p>1.1 HE+ Program Services Overview</p> <p>HE+ Program Services include:</p> <ol style="list-style-type: none"> <li><b>HE+ HVAC Program Services</b></li> </ol> <p>The HE+ Heating, Ventilation, and Air Conditioning (HVAC) Program is a year-round program that provides assistance to eligible Wisconsin households when their <b>primary heating system, central air conditioning or air source heat pump</b> is inoperable or becomes unsafe. This includes heating system, central air conditioning system and air source heat pump repairs and, when appropriate, replacement.</p> <p>If the customer is only using portable and/or window AC units or does not have an inoperable central air conditioning system or ASHP, the customer is not eligible to receive HE+ Program Services HVAC – AC. Agencies shall follow the denial process listed in the HE+ Program Services Manual (section 3.5). Agency staff should inform the customer about the Weatherization program and if eligible, refer to the local Weatherization agency.</p> <ol style="list-style-type: none"> <li>Customers utilizing a portable and/or window AC unit due to an inoperable central air conditioning unit or ASHP may be referred for HE+ Program Services HVAC- AC for an assessment of the primary cooling unit.</li> </ol>	WHEAP Wx

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
1.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Eligibility	2. The customer must have been residing in the home at the time their HVAC system, water heater or water supply system became unsafe or inoperable.	WHEAP Wx
1.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Eligibility	10. Reimbursement of applicant expense is not typically allowed when an HE+ Program Services issue is repaired or replaced by the applicant, or a contractor hired by the applicant. <i>NOTE: If a reimbursement request is received, contact the HE+ Help Desk.</i>	WHEAP Wx
1.2	<ul style="list-style-type: none"> <li>HVAC-A/C</li> </ul>	Eligibility	<i>NOTE: HE+ Program Services will not repair or replace portable and/or window air conditioning units.</i>	WHEAP Wx
1.3	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Wx-REF	<i>NOTE: In order for the WHEAP worker to generate a Wx-REF the weatherization agency must have created a building and already uploaded the home ownership verification. If the WHEAP worker receives the following alert when generating a Wx-REF, the worker shall contact the weatherization agency to confirm whether the request is a true Weatherization referral. If it is not a Wx-REF, the WHEAP worker shall enter it as a WHEAP referral instead.</i>	WHEAP Wx

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
				
1.4	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Help Desk Procedure	<p>1.4 HE+ Program Services HE+ Help Desk Procedure</p> <p>All those who work within HE+ Program Services shall review the current program year HE+ Program Services manual and keep up to date on all policy-related Informational Transmittals and manual updates. If questions or concerns arise regarding the interpretation of the policies and guidelines set forth in the current program year manual, they shall be directed to the HE+ Help Desk (<a href="mailto:heat@wisconsin.gov">heat@wisconsin.gov</a>). No additional action should be taken until a response from the HE+ Help Desk is received.</p> <ol style="list-style-type: none"> <li>When leaving a voicemail message for the HE+ Help Desk, the following shall be included in your message: <ul style="list-style-type: none"> <li>Name and call-back phone number</li> <li>Agency name</li> <li>Customer name and Person ID (PID)</li> <li>Detailed information and specific question(s)</li> </ul> </li> <li>When contacting the HE+ Help Desk via email the following shall be included:</li> </ol>	WHEAP Wx

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/Wx)		
			<ul style="list-style-type: none"> <li>Subject line: Include the program name (WHEAP, WX or PS), customer PID, last name, and one or two keywords Sample:               <div data-bbox="997 440 1591 659" style="border: 1px dashed gray; padding: 5px; margin: 10px 0;">  </div> </li> <li>Email body: Detailed information and specific questions</li> <li>All applicable attachments</li> </ul>			
2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Urgent safety concern	<p>The factors that determine response timelines for HE+ Program Services vary per service type and whether there is an <b>urgent safety concern*</b>.</p> <p>*In determining whether the situation is an urgent safety concern, the following guidelines apply:</p> <table border="1" data-bbox="716 959 1724 1274"> <tr> <td data-bbox="716 959 947 1274">No Heat (HVAC)**</td> <td data-bbox="947 959 1724 1274"> <p>The worker shall consider the expected low temperature for the next 72 hours, if there are signs of elevated carbon monoxide levels in the home, and whether the household has any vulnerable individuals (elderly, disabled, or children under six).</p> <p>**Emergency timelines apply during <b>heating season</b>.</p> </td> </tr> </table>	No Heat (HVAC)**	<p>The worker shall consider the expected low temperature for the next 72 hours, if there are signs of elevated carbon monoxide levels in the home, and whether the household has any vulnerable individuals (elderly, disabled, or children under six).</p> <p>**Emergency timelines apply during <b>heating season</b>.</p>	WHEAP Wx
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Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)				
			<table border="1"> <tr> <td>Air Control (HVAC)</td> <td>Only applies if there is a State of Emergency or Governor’s Order</td> </tr> <tr> <td>Water Conservation</td> <td>The worker shall consider if there are signs of elevated carbon monoxide levels in the home. See also backdrafting.</td> </tr> </table> <p>For more information on carbon monoxide and its effects on health, see <a href="#">Appendix E</a> for a Carbon Monoxide Information Sheet.</p>	Air Control (HVAC)	Only applies if there is a State of Emergency or Governor’s Order	Water Conservation	The worker shall consider if there are signs of elevated carbon monoxide levels in the home. See also backdrafting.	
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Water Conservation	The worker shall consider if there are signs of elevated carbon monoxide levels in the home. See also backdrafting.							
2.1.6 2.1.7 2.3.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Adding measures	After the job has been assessed, add measures to the job immediately to ensure funding is reserved.	Wx				
2.2.2 2.3.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	System notes	<p>3. Enter initial HE+ System Notes within the following time frames:</p> <ul style="list-style-type: none"> <li>a. Urgent safety concern: 3 business days</li> <li>b. All others: 10 business days</li> </ul>	Wx				
3.2.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Mobile Home Titles	<p>2. 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 worker shall assist the customer in obtaining a title by completing the following steps:</p> <ul style="list-style-type: none"> <li>g. Upload a copy of the fully completed and signed title application into the HE+ system under Homeownership Verification.</li> </ul>	WHEAP				

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
3.2.3	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Recently deceased household member	In cases of a recently deceased household member where the homeownership is in the name of the deceased person, please contact the HE+ Help Desk for assistance prior to making the referral for HE+ Program Services	WHEAP Wx
3.3	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Rentals	Rental situations require prior Help Desk approval.	WHEAP Wx
3.3	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Rentals	<ol style="list-style-type: none"> <li>The worker must confirm that the property owner's Certification Page is compliant with current WHEAP policy and homeownership records and tax forms have been uploaded in the HE+ System. <ol style="list-style-type: none"> <li>If the property owner resides in a different county/tribe, the worker must confirm that the property owner's Certification Page is compliant with current WHEAP policy and homeownership records and tax forms have been uploaded in the HE+ System.</li> </ol> </li> </ol>	WHEAP
3.4.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Ineligible Dwellings	Ineligible dwellings include but are not limited to: Dwellings where the system being assessed (HVAC heating system, central air conditioning, water heater and/or water supply system etc.) had failed prior to the customer's residency in the home.	WHEAP Wx
3.5.4	<ul style="list-style-type: none"> <li>HVAC-A/C</li> </ul>	Denial Reasons	<p>HE+ Program Services shall be denied when:</p> <ol style="list-style-type: none"> <li>The customer does not have an existing central air conditioning system or ASHP.</li> </ol> <p><i>NOTE: If the customer is only using portable and/or window AC units or does not have a method of cooling, the customer is not eligible to receive HE+ Program Services HVAC – AC and agencies should follow the denial process. Agency staff should inform the customer about the Weatherization program and if eligible, refer to the local Weatherization agency.</i></p>	WHEAP Wx

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
			<i>Customers utilizing a portable and/or window AC unit due to an inoperable central air conditioning unit or ASHP may be referred for HE+ Program Services HVAC- AC for an assessment of the primary cooling unit.</i>	
3.5.4	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Denial Reasons	11. The applicant was not living in the home with the inoperable or unsafe HVAC heating system, central air conditioning, ASHP, water heater and/or water supply system at the time the system failed or became unsafe (e.g., the system was inoperable, unsafe, in need of repairs when the home was purchased).	WHEAP Wx
3.5.4	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Denial Reasons	12. For homes purchased within 6 months of the customer's request, the customer must provide a home inspection report indicating the system was working at the time the house was sold. <ul style="list-style-type: none"> <li>a. Homes purchased 'as-is' or without an inspection report are ineligible for services for one calendar year from the purchase date.</li> </ul>	WHEAP Wx
3.5.4	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Denial Reasons	14. Online property tax records show the homeowner owes 2 years or more in property taxes	WHEAP Wx
4.3	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Contact Information Forms	2. An HE+ Program Services Contact Information Form shall be completed in tandem 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 HE+ Program Services. Agencies are issued the form via Key Survey prior to the beginning of the program year.	WHEAP Wx
5.2 5.4.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Customer present during job	<i>Note: The customer or a member of the household aged 18 or older must be present during the implementation of all HE+ Program Services jobs and HE+ Program Services final inspections (when applicable).</i>	WHEAP Wx

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)												
5.4.3																
5.2.3	<ul style="list-style-type: none"> <li>HVAC-A/C</li> </ul>	Measure Costs	<table border="1"> <thead> <tr> <th colspan="3">A/C System Replacements</th> </tr> <tr> <th>Measure Code</th> <th>Description</th> <th>Cost Maximum</th> </tr> </thead> <tbody> <tr> <td>ECRT005</td> <td>Central A/C</td> <td>\$7,000</td> </tr> <tr> <td>ECRT025</td> <td>HVAC Mobile Home A/C Replace</td> <td>\$7,000</td> </tr> </tbody> </table>	A/C System Replacements			Measure Code	Description	Cost Maximum	ECRT005	Central A/C	\$7,000	ECRT025	HVAC Mobile Home A/C Replace	\$7,000	Wx
A/C System Replacements																
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5.4	<ul style="list-style-type: none"> <li>HVAC-All</li> </ul>	ASHP Flow Chart	<p>When considering the repair or replacement of an Air Source Heat Pump, the weatherization agency shall review the <a href="#">Air Source Heat Pump (ASHP) Consideration Flow Chart</a> to determine if the customer is a good candidate. See <a href="#">Appendix G for Air Source Heat Pump and A/C replacement specifications</a>.</p> <p><i>NOTE: Prior approval from the Help Desk is required before repairing or replacing an Air Source Heat Pump.</i></p>	Wx												
5.4.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Satisfaction Survey	<p>7. An HE+ Program Services customer satisfaction survey shall be completed with the customer within 10 days of <b>the completion of the job</b> for the following Program Services jobs.</p> <ol style="list-style-type: none"> <li>Applicable HE+ Program Services jobs: <ol style="list-style-type: none"> <li>HVAC system replacements at or above \$10,000</li> <li>HVAC system repairs at or above \$3,000</li> <li>Water Conservation system replacements or repairs over \$3,000</li> </ol> </li> <li>A sample survey is located on the <a href="#">HE+ TTA website</a> under HE+ Program Services   Forms.</li> <li>Results of the survey must be documented in System Notes or uploaded to the HE+ System within 10 days of the service date. If the customer is unresponsive after three documented attempts, detailed System Notes must be made in the HE+ System.</li> <li>Surveys are not required for denials or assessments.</li> </ol>	Wx												



Manual Section	Program Service	Topic	Revision	Focus (WHEAP/Wx)
			<p>e. For replacements, surveys may be conducted during the HE+ Program Services final inspection.</p>	
5.4.3	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	HE+ Program Services Final Inspection	<p><b>5.4.3 HE+ Program Services Final Inspection</b></p> <p>The local weatherization agency, or its subcontractor, shall conduct an in-person HE+ Program Services final inspection on all HE+ Program Services HVAC system and water heater replacements to ensure the appliance has been installed per manufacturer’s instructions. The customer must be present during the installation and HE+ Program Services final inspection.</p> <ol style="list-style-type: none"> <li>As part of the HE+ Program Services final inspection, the weatherization agency, or its procured subcontractor, shall fully complete the replacement HVAC system checklist and/or water heater installation checklist upon the HE+ Program Services final inspection.</li> <li>HE+ Program Services final inspection checklists are located on the <a href="#">HE+ TTA website</a> under HE+ Program Services   Forms include: <ul style="list-style-type: none"> <li>Replacement Air Conditioner Checklist</li> <li>Replacement ASHP Checklist</li> <li>Replacement Boiler Checklist</li> <li>Replacement Gas Checklist</li> <li>Replacement Oil Checklist</li> <li>Replacement Water Heater Checklist</li> </ul> </li> <li>The final inspection can be conducted immediately following the completion of the installation.</li> <li>The inspector/installer and the customer (or household member aged 18 or over must both sign the completed HE+ Program Services final inspection checklist.</li> </ol>	Wx

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/Wx)
6.2.1	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Required Photos	<p>The following documents shall be uploaded into the HE+ System:</p> <p>3. Required photographs  The following photos are required to be uploaded in the HE+ System under the 'Program Service Photos' repository:</p> <ol style="list-style-type: none"> <li>The existing system conditions</li> <li>The manufacturer's name plate</li> <li>Installer's information, contact number, and date of installation (replacements only)</li> <li>The instruction manual left by the contractor (replacements only)</li> <li>Any other necessary documents indicating the problem or condition of the existing heating system prior to the provision of services (if applicable)</li> </ol> <p><i>NOTE: Required photos must be uploaded to Program Service Photos in the HE+ System. Additional photos that are <b>not required</b> shall be uploaded under Job Other.</i></p>	Wx
6.2.2	<ul style="list-style-type: none"> <li>HVAC-Heating</li> </ul>	AHRI	<p>For ASHP and Central AC <u>replacements</u>, the following documents shall be uploaded into the HE+ System:</p> <p>1. All replacement heating systems, except for wood burning units, shall meet the minimum Wisconsin Weatherization Program efficiency standards and the <u>AHRI Directory of Certified Product Performance</u> standards. The AHRI certificate shall be uploaded to the HE+ System under the associated repository (Central AC and ASHP).</p>	Wx
6.2.2	<ul style="list-style-type: none"> <li>HVAC-All</li> </ul>	Replacement checklist	<p>For <u>replacements</u>, the following documents shall be uploaded into the HE+ System:</p>	Wx

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
	<ul style="list-style-type: none"> <li>Water Conservation</li> </ul>		Copy of the appropriate system replacement checklist fully completed and signed by the subcontractor and the customer.	
6.3	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Sensitive Data	An agency shall not use <b>confidential information</b> for any purpose other than the limited purpose of their contract and shall not disclose such confidential information to any persons other than those who have a business-related need to have access to such information. An agency shall ensure program employees, both internal and subcontracted, shall take reasonable efforts to protect and secure sensitive information. Sensitive data are any information of which the loss, misuse, unauthorized access to, or modification of could adversely affect the Home Energy Plus Program, contracted agencies, program employees, and/or customers. Sensitive data and information include but are not limited to Social Security Numbers (SSNs), Personally Identifiable Information (PII) meaning information that can directly identify a specific individual, applicant household member, or account specific information.	Wx WHEAP
6.3.1	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>		<p>WHEAP agencies shall ensure the internal PSQA is conducted twice per program year: once by March 1 for October to February activity, and once by June 1 for March to May activity.</p> <p>Each of the two rounds of reviews shall be conducted as follows:</p> <ul style="list-style-type: none"> <li>Agencies with a prior year caseload of 5,000 or greater shall select: <ul style="list-style-type: none"> <li>6 HVAC cases*</li> <li>3 Water Conservation cases*</li> </ul> </li> <li>Agencies with a prior year caseload of fewer than 5,000 shall select: <ul style="list-style-type: none"> <li>2 HVAC cases*</li> <li>1 Water Conservation case*</li> </ul> </li> </ul> <p>*Contact the help desk if the required number of cases are not available by each deadline</p>	WHEAP

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
7.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Certification Page	2. The WHEAP agency must confirm that the property owner's Certification Page is compliant with current WHEAP policy and homeownership records and tax forms have been uploaded in the HE+ System.	WHEAP
7.3	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Final invoicing	EXCEPTION: When there is no conflict with the year-end program deadline for invoicing, HE+ Program Services referral system repairs and replacements may exceed the established time periods. A System Note shall be entered documenting the reason for the delay and the estimated time frame of completion.	Wx
7.4.1	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	System Notes	<p><i>REMINDER: The auto-populated System Notes questions shall <b>NOT</b> be deleted. The worker shall answer <b>ALL</b> questions when sending an HE+ Program Services referral. It is recommended to press 'Enter' between each question to format the system generated long email. Below is an example of the HE+ Program Services System Notes from the HE+ System with the questions answered (highlighted in green):</i></p> <div style="border: 1px solid black; padding: 5px;"> <p><b>*Notes</b></p> <ol style="list-style-type: none"> <li>1. Is this an Urgent Safety Concern? Please explain. <b>Test Answer</b></li> <li>2. What is the reported problem? (Please include system type: air control, boiler, natural gas furnace, water heater, etc.) <b>Test Answer</b></li> <li>3. Describe any conditions in the home that may prevent the contractor from assessing the HVAC and/or Water Conservation system. (Example: Pets, blocked entry, rooms that are closed off, broken steps, etc.) <b>Test Answer</b></li> <li>4. When was the last time the HVAC and/or Water Conservation system was working? <b>Test Answer</b></li> <li>5. What is the current temperature in the home? <b>Test answer</b></li> <li>6. What provisions were taken to verify the well - being of the residents? <b>Test Answer</b></li> </ol> </div>	WHEAP

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/Wx)				
7.4.2	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Troubleshooting	<p><b>Troubleshooting</b></p> <p>Troubleshooting the issue with the customer may save you from generating a referral. At the very least it can assist the weatherization agency or its subcontractor in assessing the situation.</p> <p>While the updated list of questions are the only questions required to be documented in HE+ System Notes, additional troubleshooting information may also be added. Please see the chart below for suggested troubleshooting questions to ask the customer depending on referral type.</p> <table border="1" data-bbox="716 662 1698 1336"> <tbody> <tr> <td data-bbox="716 662 1031 1057">HVAC-Heating System</td> <td data-bbox="1031 662 1698 1057"> <ul style="list-style-type: none"> <li>Is there power to the system?               <ul style="list-style-type: none"> <li>Has electricity been disconnected?</li> <li>LP or fuel oil: Is there fuel in the tank?</li> </ul> </li> <li>Is the thermostat set to 'heat'?</li> <li>Have the thermostat batteries been changed?</li> <li>Are there any obstacles around the vents and registers?</li> <li>Have the circuit breakers and on/off switch been checked?</li> <li>Has the filter been changed (if applicable)?</li> </ul> </td> </tr> <tr> <td data-bbox="716 1057 1031 1336">HVAC-Air Control</td> <td data-bbox="1031 1057 1698 1336"> <ul style="list-style-type: none"> <li>Is there power to the system?               <ul style="list-style-type: none"> <li>Has electricity been disconnected?</li> </ul> </li> <li>Is the thermostat set to 'cool'?</li> <li>Have the thermostat batteries been changed?</li> <li>Are there any obstacles around the vents and registers?</li> <li>Have the circuit breakers and on/off switch been checked?</li> </ul> </td> </tr> </tbody> </table>	HVAC-Heating System	<ul style="list-style-type: none"> <li>Is there power to the system?               <ul style="list-style-type: none"> <li>Has electricity been disconnected?</li> <li>LP or fuel oil: Is there fuel in the tank?</li> </ul> </li> <li>Is the thermostat set to 'heat'?</li> <li>Have the thermostat batteries been changed?</li> <li>Are there any obstacles around the vents and registers?</li> <li>Have the circuit breakers and on/off switch been checked?</li> <li>Has the filter been changed (if applicable)?</li> </ul>	HVAC-Air Control	<ul style="list-style-type: none"> <li>Is there power to the system?               <ul style="list-style-type: none"> <li>Has electricity been disconnected?</li> </ul> </li> <li>Is the thermostat set to 'cool'?</li> <li>Have the thermostat batteries been changed?</li> <li>Are there any obstacles around the vents and registers?</li> <li>Have the circuit breakers and on/off switch been checked?</li> </ul>	WHEAP
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HVAC-Air Control	<ul style="list-style-type: none"> <li>Is there power to the system?               <ul style="list-style-type: none"> <li>Has electricity been disconnected?</li> </ul> </li> <li>Is the thermostat set to 'cool'?</li> <li>Have the thermostat batteries been changed?</li> <li>Are there any obstacles around the vents and registers?</li> <li>Have the circuit breakers and on/off switch been checked?</li> </ul>							

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/Wx)				
			<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td data-bbox="716 305 1029 586"></td> <td data-bbox="1029 305 1698 586"> <ul style="list-style-type: none"> <li>• Has the filter been changed (if applicable)</li> </ul> </td> </tr> <tr> <td data-bbox="716 586 1029 943">Water Conservation-Water Heater</td> <td data-bbox="1029 586 1698 943"> <ul style="list-style-type: none"> <li>• Is there power to the system?               <ul style="list-style-type: none"> <li>○ Has electricity been disconnected?</li> <li>○ LP or fuel oil: Is there fuel in the tank?</li> </ul> </li> <li>• Have the circuit breakers and on/off switch been checked?</li> <li>• Is the exhaust pipe covered or blocked in any way?</li> <li>• Has the water heater been turned off and then turned on again?</li> </ul> </td> </tr> </table> <p data-bbox="716 943 1698 1089">Additional information is welcomed and appreciated and may be added at the bottom of the templated notes or the standard HE+ System Notes feature before the referral is sent.</p>		<ul style="list-style-type: none"> <li>• Has the filter been changed (if applicable)</li> </ul>	Water Conservation-Water Heater	<ul style="list-style-type: none"> <li>• Is there power to the system?               <ul style="list-style-type: none"> <li>○ Has electricity been disconnected?</li> <li>○ LP or fuel oil: Is there fuel in the tank?</li> </ul> </li> <li>• Have the circuit breakers and on/off switch been checked?</li> <li>• Is the exhaust pipe covered or blocked in any way?</li> <li>• Has the water heater been turned off and then turned on again?</li> </ul>	
	<ul style="list-style-type: none"> <li>• Has the filter been changed (if applicable)</li> </ul>							
Water Conservation-Water Heater	<ul style="list-style-type: none"> <li>• Is there power to the system?               <ul style="list-style-type: none"> <li>○ Has electricity been disconnected?</li> <li>○ LP or fuel oil: Is there fuel in the tank?</li> </ul> </li> <li>• Have the circuit breakers and on/off switch been checked?</li> <li>• Is the exhaust pipe covered or blocked in any way?</li> <li>• Has the water heater been turned off and then turned on again?</li> </ul>							
8.4	<ul style="list-style-type: none"> <li>• HVAC-All</li> <li>• Water Conservation</li> </ul>	Monthly invoicing	<p data-bbox="716 1089 1698 1304"><i>NOTE: Agencies shall upload the corresponding monthly General Ledger as supportive documentation to the HE+ System when a monthly invoice contains Program Support Costs that exceed 15% or Administration Expenses that exceed 10%. Agencies must upload the documentation into the HE+ System prior to approving an invoice.</i></p>	Wx				

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
8.5	<ul style="list-style-type: none"> <li>HVAC – All</li> <li>Water Conservation</li> </ul>	Program Support Costs	<i>HE+ Program Services final inspections shall be billed as Program Support cost</i>	Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>AHRI-Air Conditioning, Heating and Refrigeration Institute</b></p> <p>A trade association that develops standards for measuring and certifying the performance of heating, ventilation, air conditioning, commercial refrigeration, and water heating equipment.</p>	Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>appliance</b></p> <p>Any device powered by electricity or fuel designed for household use. For HE+ Program Services this includes heating systems, cooling systems, and water heaters.</p>	WHEAP Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>confidential information</b></p> <p>Sensitive data are any information of which the loss, misuse, unauthorized access to, or modification of could adversely affect the Home Energy Plus (HE+) Program, contracted agencies, program employees, and/or customers. Sensitive data and information include, but are not limited to, Social Security numbers (SSNs) and Personally Identifiable Information (PII) meaning information that can directly identify a specific individual, household member, or account-specific information.</p>	WHEAP Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>contractor</b></p> <p>A business entity that enters into a contractual agreement with an agency for the provision of services. A contractor may include a vendor or lower-tier subcontractors.</p>	WHEAP Wx

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>energy audit</b></p> <p>An assessment and documentation of existing thermal, mechanical, electric baseload and health and safety related conditions. This may be based on a Division-approved energy audit software program that generates a list of recommended weatherization measures.</p>	WHEAP Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>ENERGY STAR® standards</b></p> <p>When stated in this manual that a product shall meet ENERGY STAR® standards, it shall be certified, labelled, and listed on the ENERGY STAR® website, and conform to the criteria used by the ENERGY STAR® program to rate that product.</p>	Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>HE+ Program Services final inspection</b></p> <p>The inspection and completion of the appropriate system checklist following the installation of an HVAC system and/or water heater through HE+ Program Services. An HE+ Program Services final inspection may be completed by the weatherization agency or the agency's procured, licensed and bonded sub-contractor. The customer must be present to sign the replacement checklist.</p>	Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>Informational Transmittal</b></p> <p>Formal communications provided by the Division to the network via email regarding policy or requesting information. ITs are uploaded to the T&amp;TA website for future reference. The Program year is included in the numbering sequence.</p>	WHEAP Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> </ul>	Definitions	<p><b>payment bonds</b></p>	Wx



Manual Section	Program Service	Topic	Revision	Focus (WHEAP/ Wx)
	<ul style="list-style-type: none"> <li>Water Conservation</li> </ul>		A payment bond is a type of surety bond issued to contractors which guarantees that all entities involved with the project will be paid. A payment surety bond is a legal contract, a type of bond, that guarantees certain employees, subcontractors, and suppliers are protected against nonpayment.	
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>primary heating system</b></p> <p>The main heating system the customer uses to heat their home. If more than one system type is used in the home, the primary heating system is the system used the most by the household to heat the home.</p>	WHEAP Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>Training and Technical Assistance (T&amp;TA)</b></p> <p>Activities designed to maximize energy savings, minimize production costs, improve program management and crew/contractor “quality of work,” and/or reduce the potential for waste, fraud, abuse and mismanagement.</p>	WHEAP Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>troubleshooting</b></p> <p>Step-by-step approach to finding the root cause of an issue and deciding the best way to fix it to get it back in operation.</p>	WHEAP Wx
Appendix B	<ul style="list-style-type: none"> <li>HVAC-All</li> <li>Water Conservation</li> </ul>	Definitions	<p><b>true-up</b></p> <p>The annual financial process to close out grants at the end of the contract. The Division issues guidance to subgrantees via an Informational Transmittal.</p>	Wx