

Home Energy Plus Program Services Manual

Program Year (PY) 2026

Revised: September 2025



Table of Contents

CHAPTER 1 INTRODUCTION		APPLIES TO: WHEAP AGENCY, WX AGENCY	5
1.1	HE+ Program Services Overview		5
1.2	HE+ Program Services Criteria		7
1.3	HE+ Program Services Referral Types		8
1.4	HE+ Program Services HE+ Help Desk Procedure		9
CHAPTER 2 RESPONSE REQUIREMENTS			10
2.1	HE+ HVAC Heating Program Services Response Requirements		12
2.1.1	WHEAP Agency Response Requirements – HE+ HVAC Heating Program Services		12
2.1.2	Emergency Referrals – HE+ HVAC Heating Program Services		12
2.1.3	Non-Emergency Referrals – HE+ HVAC Heating Program Services		13
2.1.4	Weatherization Referrals (Wx-REF) – HE+ HVAC Heating Program Services		13
2.1.5	Weatherization Agency Response Requirements – HE+ HVAC Heating Program Services		13
2.1.6	Emergency Referrals – HE+ HVAC Heating Program Services		13
2.1.7	Non-Emergency Referrals – HE+ HVAC Heating Program Services		14
2.1.8	Weatherization Referrals (Wx-REF) – HE+ HVAC Heating Program Services		15
2.2	HE+ Water Conservation Program Response Requirements		15
2.2.1	WHEAP Agency Response Requirements – HE+ Water Conservation Program Services		16
2.2.2	Weatherization Agency Response Requirements – HE+ Water Conservation Program Services		16
2.3	End of Program Year HE+ Program Services Referrals		16
CHAPTER 3 ELIGIBILITY			17
3.1	WHEAP Eligibility for HE+ Program Services		17
3.1.1	HE+ Program Services Eligibility Determination		17
3.1.2	HE+ Program Services Referrals Without Social Security Number (SSN) Verification		17
3.2	Homeownership		18
3.2.1	Homeownership Verification		18
3.2.2	Mobile or Manufactured Homeownership Verification		19
3.2.3	Tribal Homeownership		20
3.3	Rental Dwellings		21
3.3.1	Mobile or Manufactured Home Rentals and Single-Family Home Rentals		21
3.4	Dwelling and Structural Eligibility		22
3.4.1	Eligible Dwellings and Structures		22
3.4.2	Ineligible Dwellings and Structures		22



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HVAC-A/C



HVAC-Heating



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WHEAP Agency



Wx Agency

3.4.3 Dwellings Affected by Natural Disaster  	23
3.5 Denying HE+ Program Services  	24
3.5.1 Denial of HE+ Program Services  	24
3.5.2 Denial of HE+ Program Services: Notification Requirements  	27
CHAPTER 4 OPERATIONAL PROCEDURES  	30
4.1 Operational Procedures: WHEAP Agency 	30
4.2 Operational Procedures: Weatherization Agency 	30
4.3 Operational Procedures: Coordination between WHEAP and Weatherization Agencies  	31
CHAPTER 5 TECHNICAL SPECIFICATIONS 	33
5.1 General  	33
5.2 Repairs and Replacements  	33
5.2.1 Repair and Replacement Cost Limits  	33
5.3 Choosing Whether to Repair or Replace  	36
5.4 Technical Specifications  	37
5.4.1 System Repair Guidelines  	38
5.4.2 System Replacement & Installation Guidelines  	38
5.4.3 HE+ Program Services Final Inspection  	39
5.4.4 Collateral Activities  	40
5.5 Primary Fuel Switch  	41
5.5.1 Additional Guidance on Primary Fuel Switches  	41
5.6 Guidance on Portable Space Heater Replacement 	42
5.7 HE+ Program Services and Weatherization 	42
CHAPTER 6 FILE DOCUMENTATION AND UPLOADS  	43
6.1 File Documentation and Uploads: WHEAP Agency 	43
6.1.1 HE+ Program Services Referrals 	43
6.2 File Documentation and Uploads: Weatherization Agency 	43
6.2.1 All HE+ Program Services Repairs and Replacements 	43
6.2.2 Additional Document Requirements for Replacements 	44
6.2.3 HE+ Program Services Weatherization Referrals (Wx-REF) 	44
6.3 HE+ Program Services Quality Assurance (PSQA) Requirements  	45
6.3.1 WHEAP Agency PSQA Requirements 	45
6.3.2 Weatherization Agency PSQA Requirements 	46
6.4 Handling Sensitive Data  	46
CHAPTER 7 PROCESSING REFERRALS  	48
7.1 General  	48



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HVAC-Heating



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7.1.1	Updating Parent Applications	48
7.2	Generating Referrals and Reserving Funds: WHEAP Agency	49
7.3	Receiving, Updating, and Invoicing Referrals: Weatherization Agency	50
7.3.1	HE+ Program Services System Repair Payment	51
7.3.2	HE+ Program Services System Replacement Payment	51
7.3.3	HE+ Program Services Assessment Payment	51
7.4	HE+ System Notes	51
7.4.1	HE+ Program Services System Notes: WHEAP Requirements	52
7.4.2	HE+ Program Services System Notes: Troubleshooting	53
7.4.3	HE+ Program Services System Notes: Weatherization Referrals (Wx-REF) WHEAP Requirements	53
7.4.4	HE+ Program Services System Notes: Weatherization Requirements	54
CHAPTER 8 COST REQUIREMENTS/MONTHLY INVOICING 		56
8.1	Monthly Invoicing for Program Support and Administrative Expenses	56
8.2	Tracking Expenses and Reimbursement	56
8.3	Allowable Costs	57
8.4	Administration Expenses	57
8.5	Program Support Costs	59
8.5.1	Payment Bonds	60
8.6	Vendor and Contract Payments	61
APPENDIX A DEFINITIONS		62
APPENDIX B HE+ PROGRAM SERVICES HVAC AIR CONTROL ELIGIBILITY PROGRAM YEAR 2026 FLOW CHART – TEXT EQUIVALENT		75
APPENDIX C CUSTOMER EDUCATION		76
APPENDIX D AIR SOURCE HEAT PUMP (ASHP) CONSIDERATION FLOW CHART		82
APPENDIX E SUMMARY OF CHANGES		84



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WHEAP Agency



Wx Agency

Disclaimer

Applies to: WHEAP Agency, Wx Agency

The State of Wisconsin Home Energy Plus (HE+) Program Services Manual is written by the Wisconsin Department of Administration (WI DOA), Division of Energy, Housing and Community Resources (DEHCR, also known as the [Division](#)¹) for use by contracting Wisconsin Home Energy Assistance Program (WHEAP) and Wisconsin Weatherization Assistance Program (WAP) agencies, counties, and/or tribes administering local HE+ Program Services. DEHCR reserves the right to change the policies and guidelines set forth in the HE+ Program Services Manual during the [program year](#) (PY).

Any DEHCR-initiated [Informational Transmittal](#) issued after the publishing of the current program year HE+ Program Services Manual and establishing new or updated policy will supersede the policies and guidelines set forth in the current program year HE+ Program Services Manual. Questions or concerns regarding the interpretation of the policies and guidelines set forth in the current program year HE+ Program Services Manual can be directed to the HE+ Help Desk (heat@wisconsin.gov or 608-267-3680).

NOTE: PY25 Home Energy Plus Program Services Manual program and policy updates are highlighted in yellow. See [Appendix E](#) for a summary of changes made to the PY25 HE+ Program Services Manual.

NOTE: Content related to a specific HE+ Program Services program and/or specific to the WHEAP or WAP agency is identified by icons and text at the end of the related text. An icon key is provided in the footer of each page of this manual.

¹ **Bolded** words are the first reference of a term or phrase and linked to the definition in [Appendix A](#).



Chapter 1 | Introduction

Applies to: WHEAP Agency, Wx Agency

Home Energy Plus (HE+) Program Services **is a year-round program** that provides assistance to eligible Wisconsin residents. Local weatherization agencies are responsible for managing program delivery and invoicing payment of completed work. The Wisconsin Home Energy Assistance Program (WHEAP) agency verifies applicant eligibility and reserves funds when generating an HE+ Program Services **referral** to the weatherization agency. WHEAP and weatherization agencies work cooperatively to ensure program goals and requirements are met while providing timely delivery of service. All other applicable WHEAP and Weatherization program requirements apply.

1.1 HE+ Program Services Overview

Applies to: WHEAP Agency, Wx Agency

HE+ Program Services include:

1. HE+ Heating, Ventilation, and Air Conditioning (HVAC) Heating Program Services

Applies to: HVAC-Heating

HE+ HVAC Heating Program Services provides assistance to eligible Wisconsin households when their **primary heating system**, or **air source heat pump** (ASHP) is inoperable or becomes unsafe. This includes heating system repair, and, when appropriate, replacement.

2. HE+ HVAC Air Control (A/C) Program Services

Applies to: HVAC-A/C

HE+ HVAC A/C Program Services offers repair or replacement of central air conditioning systems only in the following circumstances:

- The customer's primary heating system must be inoperable or unsafe, prompting the customer to call for a referral.**
- Upon assessment of the heating system, it is discovered that the customer's central air conditioning system is also inoperable or unsafe.**
- The condition of the customer's air control system will compromise the performance of the heating system.**

If the customer is only using portable and/or window air conditioning units or does not have an inoperable central air conditioning system or ASHP, the customer is not eligible to receive HE+ HVAC A/C Program Services. Agencies are required to 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.

Customers utilizing a portable and/or window air conditioning unit due to an inoperable central air conditioning unit or ASHP may be referred for HE+ HVAC A/C Program Services for an assessment of the primary cooling unit **only if the cooling unit compromises the heating unit.**



HVAC-A/C



HVAC-Heating



Water Cons.



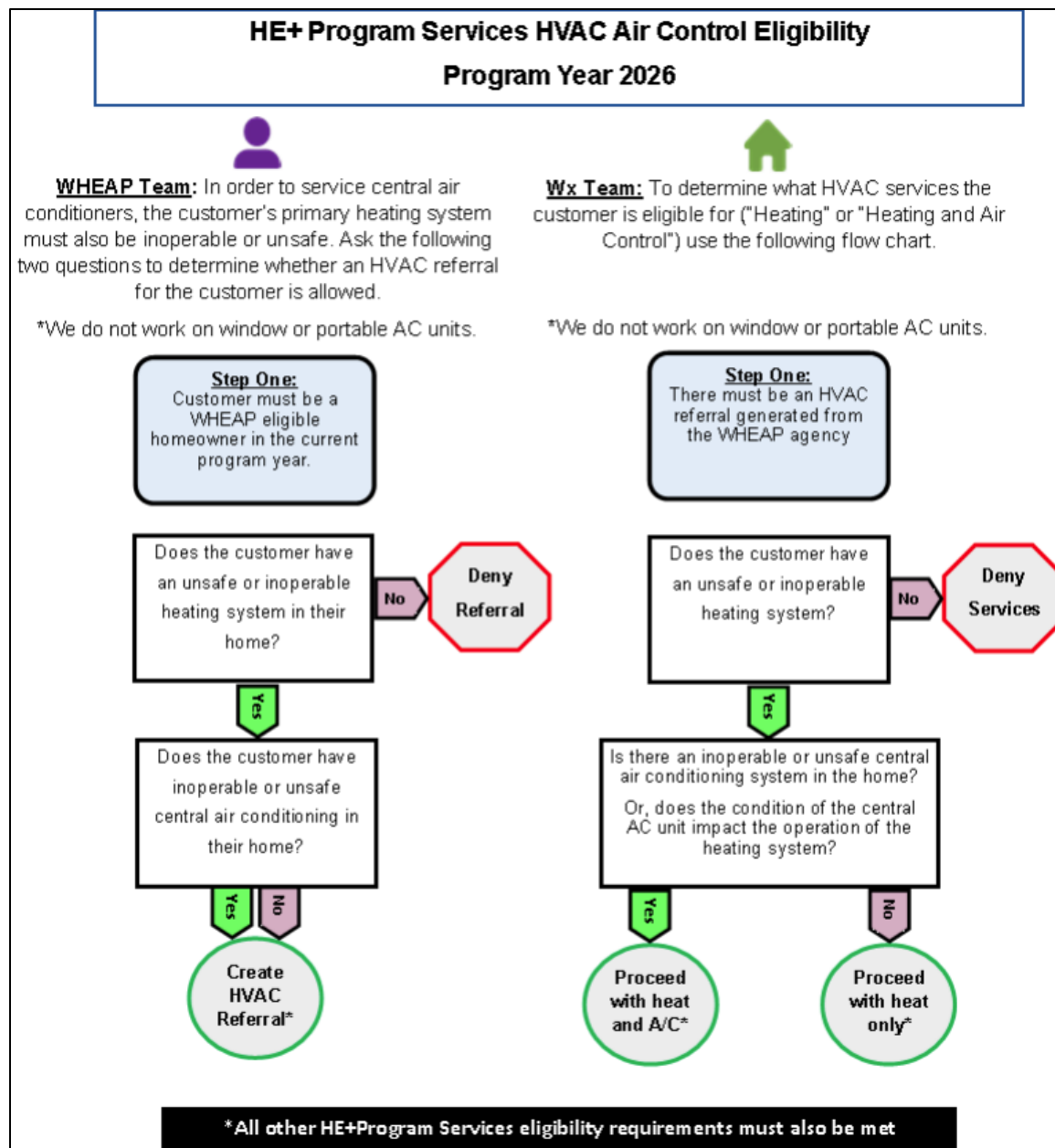
WHEAP Agency



Wx Agency

Use the following flow chart (text equivalent provided in [Appendix B](#)) to determine eligibility for HE+ HVAC A/C Program Services.

The HE+ Program Services HVAC Air Control Eligibility Program Year 2026 flow chart can also be found on the [HE+ TTA website](#) under HE+ Program Services | Resources.



3. HE+ Water Conservation Program Services

Applies to: Water Conservation

The HE+ Water Conservation Program provides assistance to eligible Wisconsin households with leaking or non-working water heaters. These [measures](#) can include collateral work needed to ensure the unit is installed per manufacturer's instruction and can operate successfully (i.e., floor repairs, shut off valves for other leaks, etc.)



HVAC-All



HVAC-A/C



HVAC-Heating



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WHEAP Agency



Wx Agency

NOTE: Additional work must be approved by the HE+ Help Desk prior to starting the job (after the assessment).

NOTE: Customers must live in the territory of a participating [Public Benefits utility](#) and be eligible for Public Benefits in order to qualify for HE+ Water Conservation Program Services.

1.2 HE+ Program Services Criteria

Applies to: HVAC-All, Water Conservation

The following criteria apply to all HE+ Program Services:

1. Current PY WHEAP eligibility is required.
2. The customer must have been residing in the home at the time their HVAC system or water heater, became unsafe or inoperable.
3. Owner-occupied single-family homes, some rental properties (including single-family homes and [mobile or manufactured homes](#)), and multifamily homes with up to four units may be eligible for HE+ Program Services when specific criteria are met.
4. Homes owned by a business (LLCs, Limited Partnerships, Corporations, etc.) are not typically eligible for HE+ Program Services. Contact the HE+ Help Desk for possible exceptions.
5. Only the heating system that utilizes the primary fuel designated in the current year HE+ Application will be serviced through HE+ Program Services unless the need for a change in the household's primary [fuel type](#) is clearly identified.

Applies to: HVAC-Heating

NOTE: If the customer has a heat pump, please contact the HE+ Help Desk for assistance with identifying the primary heat source.

6. The local WHEAP agency is responsible for verifying WHEAP eligibility prior to referring a household to the weatherization agency for HE+ Program Services assistance.
7. The weatherization agency is responsible for coordinating the installation of repairs and/or replacements, remediation steps with the [contractor](#) or applicant and entering invoices into the HE+ System.
8. The WHEAP agency is responsible for verifying applicant household safety as it relates to no heat or potentially unsafe heating or water heating system situation for HE+ Program Services referrals.
9. There is no entitlement to HE+ Program Services. There may be a [denial of service](#) for several different reasons.

NOTE: Deferrals of HE+ Program Services are not allowed.

10. Reimbursement of applicant expenses is not typically allowed when an HE+ Program Services issue is repaired or replaced by the applicant, or a contractor hired by the applicant.



a. Customers may be eligible for reimbursement if:

- i. The customer has a current, eligible WHEAP application and was WHEAP eligible at the time of the repair or replacement and
- ii. The customer has not received HE+ Program Services in the past.

NOTE: If a reimbursement request is received, agencies are required to contact the HE+ Help Desk for review.

11. HE+ Program Services provided to eligible households will never result in a property lien or charge to the customer unless fraud is identified.
12. HE+ Program Services decisions are not eligible for appeal.
13. Installing customer purchased equipment is not an allowable activity under HE+ Program Services. If the customer refuses the selected equipment, the agency shall deny the referral.

NOTE: HE+ Program Services will not repair or replace portable and/or window air conditioning units.

1.3 HE+ Program Services Referral Types

Applies to: WHEAP Agency, Wx Agency

HE+ Program Services include two basic types of referrals:

1. **WHEAP referral:** A WHEAP referral is originated by the WHEAP worker. Typically, a customer will contact the WHEAP agency with a request for assistance and the WHEAP worker will begin the referral process. The WHEAP agency is responsible for verifying homeownership for WHEAP referrals.
Applies to: WHEAP Agency
2. **Weatherization referral:** A weatherization referral (Wx-REF) originates from the weatherization agency. A representative from the weatherization agency will contact the WHEAP agency and request a referral to be generated.
 - a. It is the weatherization agency's responsibility to follow up with the WHEAP agency to ensure the Wx-REF has been generated within 5 business days.
Applies to: Wx Agency
 - b. The weatherization agency is responsible for verifying and uploading homeownership for Wx-REFs.
Applies to: Wx Agency

NOTE: In order for the WHEAP worker to generate a Wx-REF, the weatherization agency must have created a building in the HE+ System and already uploaded the home ownership verification. If the WHEAP worker receives an alert that the required Wx Home Ownership documentation is missing when generating a Wx-REF, the worker is required to contact the weatherization agency to confirm whether the request is a true weatherization referral. If it is not a Wx-REF, the WHEAP worker is required to enter it as a WHEAP referral and follow policy requirements for WHEAP referrals.



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HVAC-A/C



HVAC-Heating



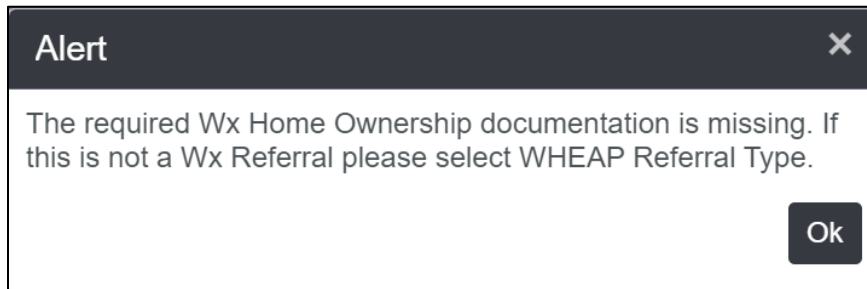
Water Cons.



WHEAP Agency



Wx Agency



1.4 HE+ Program Services HE+ Help Desk Procedure

Applies to: WHEAP Agency, Wx Agency

All those who work within HE+ Program Services are required to 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, individuals can be directed to the HE+ Help Desk (heat@wisconsin.gov). No additional action should be taken until a response from the HE+ Help Desk is received.

1. When leaving a voicemail message for the HE+ Help Desk, the following must be included in the message:
 - Name and call-back phone number,
 - Agency name,
 - Customer name and Person ID (PID),
 - Detailed information and specific question(s).
2. When contacting the HE+ Help Desk via email, the following must be included:
 - Subject line: Include the program name (WHEAP, Wx, or PS), customer PID, last name, and one or two keywords,
 - Email body: Detailed information and specific questions,
 - All applicable attachments.



HVAC-All



HVAC-A/C



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WHEAP Agency



Wx Agency

Chapter 2 | Response Requirements

Applies to: WHEAP Agency, Wx Agency

WHEAP and weatherization agencies must ensure response timelines are met in accordance with HE+ Program Services policy. Agencies are required to monitor the [Recent Tasks](#) on the HE+ System dashboard throughout the business day. HE+ System Notes explaining reasons for the delay must be entered when any response timeline requirement is not met.

The factors that determine response timelines for HE+ Program Services vary per service type and whether there is an [urgent safety concern](#)*.

REMINDER: The weatherization agency is required to alert the HE+ Help Desk if the completion date for any HE+ HVAC Heating Program Services emergency referral is extended beyond seven calendar days.

Applies to: Wx Agency

See the tables below for HE+ Program Services response timelines.

Table 2.1 WHEAP Agency Response Requirements

Applies to: WHEAP Agency

Time Period	Response Timelines
HVAC Heating Program – Heating Season October 1 – May 15	Respond to requests within: 48 hours Urgent safety concern: 18 hours
HVAC Heating Program – Non-Heating Season May 16 – September 30	Respond to requests within: 5 business days Urgent safety concern: 18 hours
Weatherization Referral Year-round	Respond to requests within: 5 business days Urgent safety concern: 18 hours
Water Conservation Program Year-round	Respond to requests within: 3 business days Urgent safety concern: 18 hours



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HVAC-A/C



HVAC-Heating



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WHEAP Agency



Wx Agency

Table 2.2 Weatherization Agency Response Requirements

Applies to: Wx Agency

Time Period	Response Timelines
HVAC Heating Program – Heating Season <i>October 1 – May 15</i>	Assess within: 24 hours of referral receipt Complete job within: 72 hours of assessment* Invoice in HE+ System within: 30 calendar days from service date
HVAC Heating Program – Non-Heating Season <i>May 16 – September 30</i>	Assess within: 10 business days Complete job within: 30 calendar days from WHEAP referral date. Invoice in HE+ System within: 30 calendar days from service date <u><i>*Urgent Safety Concern</i></u> Assess within: 24 hours Complete job within: 72 hours Invoice in HE+ System within: 30 calendar days from service date
Weatherization Referral <i>Year-round</i>	Assess within: 7 business days Update status within: 18 hours Invoice in HE+ System within: 30 calendar days from service date
Water Conservation Program <i>Year-round</i>	Assess within: 10 business days Complete job within: 30 calendar days from WHEAP referral date Invoice in HE+ System within: 30 calendar days from service date <u><i>*Urgent Safety Concern</i></u> Assess within: 24 hours Complete job within: 72 hours Invoice in HE+ System within: 30 calendar days from service date

*If the household has been provided temporary heat and there is no threat to the safety of the residents, the response time may be extended beyond 72 hours, but not beyond seven calendar days. If the response time is beyond 72 hours, the weatherization agency is required to document in HE+ System Notes the reason for the delay and verify there is no safety threat to household members.

*In determining whether the situation is an urgent safety concern, the following guidelines apply.

Table 2.3 Urgent Safety Concern Determination

Service Type	Guidelines
No Heat (HVAC)**	The worker is required to 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). **Emergency timelines apply during heating season.
Water Conservation	The worker is required to consider if there are signs of elevated carbon monoxide levels in the home. See also backdrafting.



HVAC-All



HVAC-A/C



HVAC-Heating



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WHEAP Agency



Wx Agency

For more information on carbon monoxide and its effects on health, see [Appendix C](#) for a [Carbon Monoxide Information Sheet](#).

2.1 HE+ HVAC Heating Program Services Response Requirements

Applies to: WHEAP Agency, Wx Agency, HVAC-Heating

The factors that determine response timelines for HE+ HVAC Heating Program Services are the time of year the referral was generated and whether the referral is a WHEAP referral or a weatherization referral (Wx-REF).

1. **Heating season:** Wisconsin's heating season runs from October 1 through May 15. HE+ HVAC Heating Program referrals generated during the heating season are considered [Emergency HE+ HVAC Heating Program Services referrals](#) and emergency timelines apply.
2. **Non-heating season:** Wisconsin's non-heating season is May 16 through September 30. HE+ HVAC Heating Program Services referrals generated during the non-heating season are typically considered [Non-Emergency HE+ HVAC Heating Program Services referrals](#) unless there is an urgent safety concern. In the case of an urgent safety concern, emergency timelines apply.

2.1.1 WHEAP Agency Response Requirements – HE+ HVAC Heating Program Services

Applies to: WHEAP Agency, HVAC-Heating

The local WHEAP agency is responsible for verifying that applicants waiting for HE+ HVAC Heating Program Services (emergency and non-emergency referrals) have access to temporary heat and verifying whether the customer chooses to remain in the home until the heating situation is addressed.

EXCEPTION: For weatherization referrals, the weatherization agency is responsible for verifying whether the customer has access to temporary heat and verifying whether the customer chooses to remain in the home until the heating situation is addressed.  

Applies to: Wx Agency, HVAC-Heating

2.1.2 Emergency Referrals – HE+ HVAC Heating Program Services

Applies to: WHEAP Agency, HVAC-Heating

During the heating season (October 1 to May 15), the local WHEAP agency is required to respond to requests for HE+ HVAC Heating Program Services within 48 hours* of receiving the request from the customer. The [request date](#) for HE+ Program Services is the date the WHEAP agency receives the request from the eligible applicant for HE+ Program Services.

**If the situation is an urgent safety concern, the WHEAP agency is required to respond within 18 hours.*



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HVAC-Heating



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WHEAP Agency



Wx Agency

2.1.3 Non-Emergency Referrals – HE+ HVAC Heating Program Services

Applies to: WHEAP Agency, HVAC-Heating

During the non-heating season (May 16 to September 30), the local WHEAP agency is required to respond to requests for HE+ HVAC Heating Program Services within five business days* of the initial request from the customer.

**If the situation is an urgent safety concern, the WHEAP agency is required to respond within 18 hours.*

2.1.4 Weatherization Referrals (Wx-REF) – HE+ HVAC Heating Program Services

Applies to: WHEAP Agency, HVAC-Heating

When a weatherization agency representative contacts the WHEAP agency to request a weatherization referral, the WHEAP agency is required to respond to the request within five business days* of the initial request from the weatherization agency. For a Wx-REF, the request date is the date of referral.

**If the situation is an urgent safety concern, the WHEAP agency is required to respond within 18 hours.*

2.1.5 Weatherization Agency Response Requirements – HE+ HVAC Heating Program Services

Applies to: Wx Agency, HVAC-Heating

The weatherization agency is required to develop their own process to ensure HE+ System contacts are updated, and HE+ Program Services referrals are monitored daily.

2.1.6 Emergency Referrals – HE+ HVAC Heating Program Services

Applies to: Wx Agency, HVAC-Heating

During the heating season, (October 1 to May 15), the weatherization agency is required to:

1. Verify that the building and heating system criteria for HE+ HVAC Heating Program Services are met, and a [heating system assessment](#) is conducted within 24 hours of receiving the referral from the WHEAP agency.
2. Create a Job ID within three business days of receiving the referral.
NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes are required to be made in the HE+ System explaining the delay.
3. After the job has been assessed, add measures to the job immediately to ensure funding is reserved.
4. Enter initial HE+ System Notes within three business days of referral receipt.
 - a. See [Section 7.4.4](#) for System Notes requirements.
5. Complete services within 72 hours of receiving the referral from the WHEAP agency.
 - a. In the case of a delayed response (heating system assessment conducted beyond 24-hour deadline, or services completed after 72-hour deadline), the weatherization agency is required to document in HE+ System Notes all of the following:



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HVAC-A/C



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WHEAP Agency



Wx Agency

- i. The reason for the delay,
- ii. Details as to whether the household has access to temporary heat, can be provided temporary heat, or is able to relocate, and if the customer chooses to remain in the home while waiting for services, and
- iii. Verification of the well-being of the residents and any special needs of the family.

6. Invoice the job in the HE+ System within 30 days of the [service date](#).

EXCEPTION: If the household has been provided temporary heat or there is no threat to the safety of the residents, the response time may be extended beyond 72 hours, but not beyond seven calendar days. HE+ System Notes must be entered.

REMINDER: The weatherization agency is required to alert the HE+ Help Desk if the completion date for any HE+ HVAC Heating Program Services emergency referral is extended beyond seven calendar days. 🏠

Applies to: Wx Agency

2.1.7 Non-Emergency Referrals – HE+ HVAC Heating Program Services 🔥

Applies to: Wx Agency, HVAC-Heating

During the non-heating season (May 16 - September 30), the weatherization agency is required to:

1. Verify that criteria for HE+ HVAC Heating Program Services are met and assess the heating system condition within 10 business days of the WHEAP referral.
2. Create a Job ID within three business days of the referral receipt.

NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes are required to be made explaining the delay.

3. After the job has been assessed, add measures to the job immediately to ensure funding is reserved.
4. Enter initial HE+ System Notes within 10 business days of referral receipt.

5. Complete the job within 30 calendar days of the WHEAP [referral date](#).

- a. The job must be invoiced in the HE+ System within 30 calendar days of the [service date](#).

6. If the situation is an urgent safety concern:

- a. Respond within 24 hours of receiving the referral.
- b. Create a Job ID within three business days of referral receipt.

NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes are required explaining the delay.

- c. After the job has been assessed, add measures to the job immediately to ensure funding is reserved.
- d. Enter initial HE+ System Notes within three business days of referral receipt.
 - i. See [Section 7.4.4](#) for System Notes requirements.
- e. Complete the job within 72 hours of receiving the referral from the WHEAP agency.



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HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

- i. In the case of a delayed response (heating system assessment conducted beyond 24-hour deadline, or services completed after 72-hour deadline), the weatherization agency is required to document in HE+ System Notes all of the following:
 1. The reason for the delay,
 2. Details as to whether the household has access to temporary heat, can be provided temporary heat, or is able to relocate, and if the customer chooses to remain in the home while waiting for services, and
 3. Verification of the well-being of the residents and any special needs of the family.

EXCEPTION: If the household has been provided temporary heat or there is no threat to the safety of the residents, the response time may be extended beyond 72 hours, but not beyond seven calendar days. HE+ System Notes are required to be entered.

REMINDER: The weatherization agency is required to alert the HE+ Help Desk if the completion date for any HE+ HVAC Heating Program emergency referral is extended beyond seven calendar days.

- f. Provide a status update to the WHEAP agency so they may take appropriate action to ensure the well-being of the household.

NOTE: In the case of a primary fuel switch, response requirements do not apply when a main and/or lateral is being extended.

2.1.8 Weatherization Referrals (Wx-REF) – HE+ HVAC Heating Program Services

Applies to: Wx Agency, HVAC-Heating

The weatherization agency is required to follow response timelines according to the time of year and urgency of the situation.

*NOTE: For non-emergency and weatherization referrals, if the heating system repair or replacement is delayed beyond 30 calendar days from the WHEAP referral date, the weatherization agency is required to document the reason for the delay in HE+ Program Services System Notes **and alert the HE+ Help Desk**. This situation may occur due to a variety of factors related to the cycle for completing heating system work under non-emergency conditions or as part of a weatherization job.*

2.2 HE+ Water Conservation Program Response Requirements

Applies to: Water Conservation

The factors that determine response timelines for HE+ Water Conservation Program Services are based on whether there is an urgent safety concern.



HVAC-A/C



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WHEAP Agency



Wx Agency



HVAC-A/C

2.2.1 WHEAP Agency Response Requirements – HE+ Water Conservation Program Services



Applies to: WHEAP Agency, Water Conservation

1. The local WHEAP agency is required to respond to requests for HE+ Water Conservation Program Services within three business days of receiving the request from the customer.
2. If the situation is an urgent safety concern the WHEAP agency is required to respond within 18 hours. An urgent safety concern also includes reports of [backdrafting](#).

2.2.2 Weatherization Agency Response Requirements – HE+ Water Conservation Program Services

Applies to: Wx Agency, Water Conservation

The weatherization agency is required to:

1. Verify that the building criteria for HE+ Water Conservation Program Services are met, and a [water heater assessment](#) is conducted within 10 business days of receiving the HE+ Program Services referral from the WHEAP agency.
2. Create a Job ID within three business days of referral receipt.
NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes are required explaining the delay.
3. After the job has been assessed, add measures to the job immediately to ensure funding is reserved.
4. Enter initial HE+ System Notes within the following time frames:
 - a. Urgent safety concern: 3 business days.
 - b. All others: 10 business days.
5. If the situation is an urgent safety concern, respond within 24 hours. An urgent safety concern also includes reports of backdrafting.
6. Complete the job within 30 calendar days of the WHEAP referral date.
 - a. The job must be invoiced in the HE+ System within 30 calendar days of the service date.

2.3 End of Program Year HE+ Program Services Referrals

Applies to: WHEAP Agency, Wx Agency

An Informational Transmittal is sent out to announce the deadline for completion of the current program year HE+ Program Services work and invoicing in the HE+ System. At that time the Division recommends that weatherization agencies contact their WHEAP agencies with a cut-off date for current program year HE+ Program Services referrals. This will ensure all outstanding HE+ Program Services jobs are finished and invoiced in time for the final extraction of the current program year.



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WHEAP Agency



Wx Agency

Chapter 3 | Eligibility

Applies to: WHEAP Agency, Wx Agency

3.1 WHEAP Eligibility for HE+ Program Services

Applies to: WHEAP Agency

The household is required to meet the financial and non-financial eligibility requirements for WHEAP benefits. WHEAP agencies are required to ensure that proof of WHEAP eligibility has been uploaded into the HE+ System.

WHEAP agencies may be responsible for repayment of HE+ Program Services if:

1. Homeownership is not verified in compliance with HE+ Program Services policy.
2. HE+ Program Services are completed before the household's HE+ Program Services eligibility has been determined in compliance with policy.
3. An HE+ Program Services referral was sent to the weatherization agency when the application contains a denial reason (agencies are required to "Save" the referral before marking it "Ready for Referral").

If the WHEAP agency becomes aware that any of the above has occurred, the WHEAP worker is required to immediately contact the weatherization agency to inform them.

The household will not be held responsible for repayment in the above circumstances and program funds may not be utilized for these repayments.

3.1.1 HE+ Program Services Eligibility Determination

Applies to: WHEAP Agency

The local WHEAP agency is required to determine WHEAP eligibility and verification of homeownership by completing the HE+ Application process prior to sending an HE+ Program Services referral to the weatherization agency.

Verification of current homeownership must be uploaded into the HE+ System each time HE+ Program Services are requested. Verification documentation from prior referrals 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).

NOTE: In situations involving ALL landlords, the worker must contact the HE+ Help Desk for approval prior to generating the HE+ Program Services referral for the tenant. This also applies to weatherization agencies when verifying ownership for a Weatherization referral (Wx-REF). 

Applies to: Wx Agency

3.1.2 HE+ Program Services Referrals Without Social Security Number (SSN) Verification

Applies to: WHEAP Agency

Agencies must not make any HE+ Program Services referrals until all SSNs on the HE+ Application have been verified and the HE+ Application is complete.



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Wx Agency

EXCEPTIONS

1. If the social security number in question has been verified by the worker in CARES Worker Web (CWW), the agency may process an HE+ Program Services [manual referral](#) via email to the weatherization agency.
2. Infants (newborns) less than 60 days old where an SSN has not yet been issued may be processed without a valid SSN if the applicant has applied for an SSN for the infant. Contact the HE+ Help Desk for approval.

NOTE: The agency is required to enter an HE+ System Note indicating the recipient of the manual referral, the date it was sent, and the exception verification used. The agency must also alert the HE+ Help Desk in writing notifying the Division of the manual referral. The worker is required to notify the applicant that they are responsible for repayment if any SSN on the HE+ Application cannot be verified (resulting in the application being incomplete).

3.2 Homeownership

Applies to: WHEAP Agency, Wx Agency

The applicant, or a member of the household listed on the HE+ Application, must be the recorded owner of the home (dwelling) or be an eligible renter to receive HE+ Program Services. Homeownership is required to be verified prior to the referral for HE+ Program Services.

1. The WHEAP agency is responsible for verifying homeownership for WHEAP referrals. 
Applies to: WHEAP Agency
2. The weatherization agency is responsible for verifying homeownership for weatherization referrals. 
Applies to: Wx Agency

NOTE: This section covers requirements for homeownership, not rental eligibility. For information about rental eligibility, see [Section 3.4](#).

3.2.1 Homeownership Verification

Applies to: WHEAP Agency, Wx Agency

Verification of homeownership for homes *not on tribal land* must be verified from the associated county online tax portal.

1. The property records must show that a household member is the current owner.
NOTE: A customer's name listed "in care of" or "c/o" on the mailing address does not necessarily indicate ownership.
2. Records are required to be reviewed to confirm that the owner's property address matches the dwelling address entered in the HE+ System.
3. Homes in [probate](#) are ineligible for HE+ Program Services with the possible exception of a recently deceased homeowner.
 - a. In cases of a recently deceased (within 30 days) household member where the homeownership is in the name of the deceased person, please contact the HE+ Help Desk for a possible waiver.



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Wx Agency

4. Life estate, life tenancy, trust, or irrevocable trust documentation that is recorded with the county Register of Deeds may be used to satisfy the required homeownership verification, provided the individual lives in the dwelling.

NOTE: If the life estate is included in the provisions of a will made by the former owner of the property, the requirement for registration may be waived. For further guidance contact the HE+ Help Desk.

5. Land contract buyers may be considered homeowners if the land contract is registered with the county Register of Deeds and the buyer is responsible for paying the property taxes and building maintenance. Notarization of the contract does not establish the buyer's claim to the property.

If an agency is unable to verify homeownership, contact the HE+ Help Desk prior to making the referral for HE+ Program Services.

3.2.2 Mobile or Manufactured Homeownership Verification

Applies to: WHEAP Agency, Wx Agency

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 is required to show that a household member is the current owner.

Depending on the customer's situation, agencies should use the appropriate resources below to obtain verification of homeownership for mobile or manufactured homes:

1. The customer owns the mobile or manufactured home but cannot provide the title:
 - a. Use the [Department of Safety and Professional Services \(DSPS\) Electronic Safety and Licensing Application \(eSLA\) website](#) to search for current homeownership,
 - b. Click on the "Search" drop-down and select "Manufactured Home Titling" to begin a search,
 - c. Enter the customer's details and click "Search",
 - i. If the correct home is in the database with a household member shown as the owner, upload a copy into the HE+ System and proceed with the referral.
 - ii. If the correct home is not in the database, see below.
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 is required to assist the customer in obtaining a title by completing the following steps:
 - a. Access the [DSPS website](#),
 - b. Download and print out the appropriate form,
 - c. Complete the appropriate form with the customer's assistance,
 - d. Have the customer provide the worker with a check or money order for the processing fee,
 - e. The worker is required to stamp and address the envelope to:



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Wx Agency

State of Wisconsin DSPS - Manufactured Homes Unit
PO Box 8935
Madison, WI 53708-8935

- f. Inform the customer that it is their responsibility to provide the 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+ Program Services,
 - g. Upload a copy of the fully completed and signed title application into the HE+ System under Homeownership Verification,
 - h. Enter HE+ System Notes that detail the transaction,
 - i. Once the worker has ensured the mailing of the Certificate of Title application and appropriate payment from their office, the HE+ Program Services referral can be generated.
3. 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. Verification of ownership obtained from the appropriate county online tax portal is the preferred proof of property ownership.
4. Homes in probate are ineligible for HE+ Program Services with the possible exception of a recently deceased homeowner.
 - a. In cases of a recently deceased (within 30 days) household member where the homeownership is in the name of the deceased person, please contact the HE+ Help Desk for a possible waiver.

If an agency is unable to verify mobile or manufactured homeownership utilizing one of the above methods, contact the HE+ Help Desk prior to making the referral for HE+ Program Services.

REMINDER: Crisis funds are not allowed for fees associated with title request. 
Applies to: WHEAP Agency

3.2.3 Tribal Homeownership

Applies to: WHEAP Agency, Wx Agency

If the dwelling is on tribal land, a Tribal Attestation of Homeownership form must be fully completed and submitted by a tribal official. The Tribal Attestation of Homeownership form is available on the [Home Energy Plus Training & Technical Assistance \(HE+ TTA\) website](#) under HE+ Program Services | Forms.

1. The document must show that a household member is the current owner of the dwelling located on tribal land.
2. Homes in probate are ineligible for HE+ Program Services with the possible exception of a recently deceased homeowner.



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WHEAP Agency



Wx Agency

- a. In cases of a recently deceased (within 30 days) household member where homeownership is in the name of the deceased person, contact the HE+ Help Desk for a possible waiver.
3. The attestation form must be signed (either manually or typed) and dated by a tribal official.
4. The homeownership documentation used for verification is required to be uploaded into the HE+ System.
5. Contact the HE+ Help Desk for assistance in determining tribal homeownership when the tribal attestation is unavailable.

3.3 Rental Dwellings

Applies to: WHEAP Agency, Wx Agency

Rental situations require prior HE+ Help Desk approval. In most rental situations where the landlord receives rental income from the tenant, the HE+ Program Services request will be denied.

For referrals involving ALL landlords, the worker must contact the HE+ Help Desk for approval prior to generating the HE+ Program Services referral for the tenant. This also applies to weatherization agencies when verifying ownership for a Weatherization referral (Wx-REF).

3.3.1 Mobile or Manufactured Home Rentals and Single-Family Home Rentals

Applies to: WHEAP Agency, Wx Agency

Customers who reside in a rented mobile or manufactured home or rented single-family home may be eligible for HE+ Program Services when:

1. The applicant residing in the rental home and the building owner are both WHEAP eligible in the current program year with a complete HE+ Application in the HE+ System.
 - a. A current program year eligible application is required for the property owner.
 - b. The property owner must provide a copy of their most recent tax return including Tax Form 1040 and supporting schedules.
 - i. If rental income is not verified by income taxes for the homeowner or dwelling owner, the homeowner, including the tenant, may not be eligible for HE+ Program Services.

NOTE: If the homeowner or dwelling owner of the rental unit does not file taxes or owns multiple dwellings, contact the HE+ Help Desk prior to sending a referral.

2. The worker must confirm that the property owner's Certification Page is compliant with current WHEAP policy, and that homeownership records and tax forms have been uploaded in the HE+ System.
 - a. 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 that homeownership records and tax forms have been uploaded in the HE+ System.
 - b. Agencies must include in the initial HE+ Program Services System Notes that the property owner is WHEAP eligible and tax forms were used to verify rental income. The property owner's Person ID is required to also be included in System Notes.



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REMINDER: In situations involving ALL landlords, the worker is required to contact the HE+ Help Desk for approval prior to generating the HE+ Program Services referral for the tenant. This also applies to weatherization agencies when verifying ownership for a Weatherization referral (Wx-REF).

3.4 Dwelling and Structural Eligibility

Applies to: WHEAP Agency, Wx Agency

3.4.1 Eligible Dwellings and Structures

To be eligible for HE+ Program Services, there must be an existing system (HVAC system or water heater) installed in the dwelling.

Buildings eligible for HVAC and/or approved water conservation system repair or replacement are:

1. Owner-occupied single-family homes,
2. Owner-occupied single-family homes where two or fewer bedrooms are rented to roomers,
3. Owner-occupied mobile or manufactured home,
4. Owner-occupied 2–4-unit buildings with one heating and/or water conservation system serving one or more units of the dwelling,
5. [Tiny homes](#) may be eligible for HE+ Program Services. Agencies are required to contact the HE+ Help Desk for approval prior to beginning any services.

NOTE: In situations involving ALL landlords, the worker must contact the HE+ Help Desk for approval prior to generating the HE+ Program Services referral for the tenant. This also applies to weatherization agencies when verifying ownership for a Weatherization referral (Wx-REF).

3.4.2 Ineligible Dwellings and Structures

Applies to: WHEAP Agency, Wx Agency

[Ineligible dwellings](#) include but are not limited to:

1. Dwellings where the system that is being assessed (HVAC heating system, central air conditioning or water heater) had failed prior to the customer's residency in the home, 
 - a. If after the assessment of a failed system the weatherization agency or its subcontractor determines the system has not been in working condition prior to the customer's residency in the home, the weatherization agency is required to receive approval from the HE+ Help Desk prior to proceeding with HE+ Program Services.
2. Buildings that contain a residential and a commercial unit where both the residential and commercial units share a heating system **and/or** water heater,
3. New construction or units undergoing major remodeling projects,
4. Dwellings where a system (HVAC system or water heater) does not exist,
 - a. Systems are required to be associated with the eligible unit identified by the agency.
5. Secondary home (e.g., vacation home, seasonal home, Airbnb),
6. Shelters not designed for use for year-round human habitation,



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7. Multi-unit building with 5 or more units,
8. Mobile shelters such as recreational vehicles (RVs), tents, campers, and vehicles (even if modified with permanent additions),
9. Assisted living facility or nursing home,
10. Group home, halfway house, Community-Based Residential Facility, or foster home
11. Government or institutional facilities (e.g., jail, hospital, care institution),
12. Rooming house, motel, hotel, YMCA, or YWCA,
13. Adult Family Home (as licensed by the Wisconsin Department of Health Services),
14. Transitional housing facilities,
15. Deer stand, ice shanties, or tents,
16. Abandoned buildings or spaces,
17. Dwellings created by making vehicles, or parts of vehicles, immobile by putting them on blocks or otherwise attaching them to a site,
18. Residential buildings that consist of five or more units (unless the applicant owns the unit where the HVAC and/or water system that is not safe or not working is located, such as a condo),
19. Structures originally designed and built for a use other than residential (e.g., manufacturing, commercial, worship) and have been either converted to residential or are being used as a residential building will be reviewed on a case-by-case basis.
 - a. The weatherization agency is required to receive approval from the HE+ Help Desk prior to proceeding with HE+ Program Services. 🏠
Applies to: Wx Agency

3.4.3 Dwellings Affected by Natural Disaster 🧑🏠

Applies to: WHEAP Agency, Wx Agency

1. WHEAP-eligible applicants that have a HVAC system and/or water heater damaged by flood, fire, or other natural disaster needing repair or replacement can be referred for HE+ Program Services.
 - a. The WHEAP worker is required to ask the customer if they have homeowner's insurance.
 - i. If the customer states they do not have homeowner's insurance, no further documentation is needed, and the referral can be generated.
 - ii. If the customer does have homeowner's insurance, the worker is required to contact the HE+ Help Desk prior to creating a referral.
 - iii. HE+ Program Services funds cannot be used to pay customers' insurance deductibles. If the customer has homeowner's insurance but cannot afford the deductible, the worker is required to contact the HE+ Help Desk.
 - b. If the home is deemed uninhabitable, the worker is required to contact the HE+ Help Desk before denying the referral request.



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Wx Agency

NOTE: The WHEAP worker is required to make detailed notes in the HE+ System. 
Applies to: WHEAP Agency

- c. Before replacing a HVAC system or water heater that has been incapacitated due to flooding, the weatherization agency or its subcontractor is required to provide an estimated cost of moving the system to an area in the home protected from flooding.



Applies to: Wx Agency

- i. If it is not possible to relocate the system out of a flood-prone area of the home, the agency is required to contact the HE+ Help Desk for guidance prior to replacing the heating system.

3.5 Denying HE+ Program Services

Applies to: WHEAP Agency, Wx Agency

The decision to deny work is difficult, but necessary in some cases. Grantees are expected to pursue reasonable options on behalf of the dwelling owner, and to use good judgment in dealing with difficult situations.

Grantees must not simply deny service without pursuing other options and attempting to identify other resources to address the identified hazard(s).

The Division administers several housing programs that may be appropriate referral resources, including:

1. [Community Development Block Grant \(CDBG\) - Small Cities Housing Program](#)

These funds are primarily used for rehabilitation of housing units, homebuyer assistance, and small neighborhood public facility projects.

2. [CDBG - Revolving Loan Fund \(RLF\) Program](#)

Under the CDBG RLF, homeowners in owner-occupied dwellings and homebuyers receive 0% interest loans that are either deferred or have low monthly payments.

3. [HOME Homebuyer and Rehabilitation Program](#)

A program was established to provide essential home purchase assistance and necessary home rehabilitation and other vital improvements for dwelling units occupied by income-eligible households.

NOTE: Deferrals of HE+ Program Services are not allowed.

REMINDER: Contact the HE+ Help Desk for direction when dealing with difficult situations.

3.5.1 Denial of HE+ Program Services

Applies to: WHEAP Agency, Wx Agency

The “Denied Program Service” report provides a list of Program Services referrals that have been entered by WHEAP and/or Wx agencies that have been subsequently denied and extracted (Denied – Extracted).



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Wx Agency

NOTE: Deferrals of HE+ Program Services are not allowed.

HE+ Program Services are required to be denied when:

1. The dwelling is ineligible (see [Section 3.4](#)).
2. The situation does not meet the *no heat* requirements for the program.
 - a. *A household is considered to be in a no heat situation when the primary heating system is not producing heat or is unsafe to operate (e.g., leaking carbon monoxide (CO) into the living space, flames rolling out of the firebox, or similar problems).*
 - b. A no heat situation does **not** exist if:
 - i. The heating system is functioning, but the distribution system is only delivering heat to part of the dwelling.
 - ii. The heating system is not operating at its peak efficiency but is delivering heat to the home.
 - iii. The heating system is not running due to electricity being disconnected or no fuel is available to run the heating system.
3. The HVAC system or water heater is working as it should and there is not an urgent safety concern to the applicant household.
4. There is a secondary heating system capable of providing adequate heat to the dwelling throughout the entirety of the heating season.

EXCEPTION: If the customer is using electric space heaters as a supplemental heating source, a referral is required to be made to assess the primary heating system. If the customer has a heat pump, please contact the HE+ Help Desk.

5. The customer is requesting service on a secondary system.

NOTE: If the customer has a heat pump, please contact the HE+ Help Desk prior to denying services.

The customer does not have an existing central air conditioning system or ASHP that is compromising the heating unit. *NOTE: If the customer is only using portable and/or window air conditioning units or does not have a method of cooling, the customer is not eligible to receive HE+ Program Services HVAC – air conditioning 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.*

6. The applicant has mistreated and/or altered the operation of the HVAC system or water heater.
7. Regular home maintenance on the HVAC system or water heater has not been completed causing the system issue. Examples include, but are not limited to:
 - Appropriate HVAC filters not used or changed
 - Regular bleeding of boiler not completed
 - The wrong fuel type for the system being used
 - Water pipes frozen* or broken due to lack of maintenance

NOTE: Contact the HE+ Help Desk prior to denying services.



*See [Appendix C](#) for [tips on preventing frozen pipes](#).

8. Two or more documented appointments (or phone calls made to schedule an appointment) by the weatherization grantee or contractor have been missed or not responded to by the customer. 🏠

Applies to: Wx Agency

- a. Dates and times of calls and/or appointments made and subsequently missed or not responded to by the customer are required to be added to HE+ System Notes.
 - b. Customers who indicate they will not be available for an assessment and/or service for two (2) weeks or more shall be denied and instructed to contact their WHEAP agency when they return.
9. The applicant was not living in the home with the inoperable or unsafe HVAC heating system, central air conditioning, ASHP, water heater at the time the system failed or became unsafe (e.g., the system was inoperable, unsafe, and/or in need of repairs when the home was purchased).
10. The dwelling is or appears to be unoccupied. 🏠
Applies to: Wx Agency
 - a. If during the initial system assessment, the contractor and/or weatherization agency observes the dwelling unit is not occupied (no furniture in the home, unplowed/unshoveled sidewalk/driveway), the contractor and/or weatherization agency are required to cease the provision of services and the weatherization agency is required to contact the HE+ Help Desk for additional guidance.
 - i. If fraud is suspected, cease the provision of services, and contact the HE+ Help Desk for additional guidance.
11. For homes purchased within six (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.
 - a. Homes purchased "as-is" or without an inspection report are ineligible for services for one calendar year from the purchase date.
12. The building is for sale or is in foreclosure proceedings.
 - a. Homes must be off the market for one year before being eligible for HE+ Program Services. Contact the HE+ Help Desk for guidance on establishing the date of eligibility.

NOTE: If the worker is aware that the customer has filed bankruptcy, the worker is required to contact the HE+ Help Desk prior to generating a referral.

13. Online property tax records show the homeowner owes two (2) **full** years or more in property taxes and does not have a payment plan in place with the county treasurer's office.
 - a. Agency must confirm payment arrangements with a county official. HE+ System Notes are required.
 - b. Contact the HE+ Help Desk for approval prior to generating the referral.

NOTE: Current property taxes are considered delinquent if payment has not been made by October of the current year.



14. The household and/or homeowner have adequate resources (or assets) to address the system issue.
 - a. While WHEAP eligibility does not have a vehicle or asset limit test, assets may be considered when deciding HE+ Program Services.

NOTE: Contact the HE+ Help Desk prior to denying services.
15. Condition, clutter or maintenance of the dwelling prohibits access to the HVAC system, and/or water heater, or prevents the system from safely operating.
16. Worker safety is threatened due to the structural condition or maintenance of the dwelling, occupant(s) behavior, unrestrained animals, or illegal activity. 🏠
Applies to: Wx Agency
17. Hazardous conditions are present in the home. Including but not limited to: 🏠
Applies to: Wx Agency
 - a. Chemical or combustion hazard in the home,
 - b. Presence of lead paint,
 - c. Standing water, moisture and/or mold,
 - d. Possible asbestos-containing material,
 - e. Sewage or animal feces,
 - f. Vermin or pests.
18. The home is undergoing major remodeling.
19. Repairs that are out of the scope of HE+ Program Services are needed to the home (structural, electrical, or other).
20. Funds allocated to HE+ Program Services have been expended.
21. In the case of a non-emergency fuel switch when the main and/or lateral line has not yet been installed, the job must be denied by the weatherization agency and the customer advised to call their WHEAP agency when the installation is complete to request a new referral.
22. Other.

NOTE: If the situation is resolved at a later date and the customer remains WHEAP eligible, a new HE+ Program Services referral may be generated by the WHEAP agency.

3.5.2 Denial of HE+ Program Services: Notification Requirements 🧑🏠

Applies to: WHEAP Agency, Wx Agency

1. WHEAP Agency Requirements 🧑

Applies to: WHEAP Agency

If the WHEAP agency denies a request for HE+ Program Services due to the customer not meeting eligibility requirements, the WHEAP worker is required to complete all the following steps:

- a. Provide the customer with a verbal denial (in person or over the phone) within 48 hours of the request or within 18 hours when there is an urgent safety concern.



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HVAC-Heating



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WHEAP Agency



Wx Agency

- b. Refer the customer to other local entities that may be able to assist.
- c. Mail an HE+ Program Services Denial Notification within two business days indicating the customer's request has been denied and explain the reason for the denial and what other resources may be available to the customer.

- i. The HE+ Program Services Denial Notification template is available on the [HE+ TTA website](#) under HE+ Program Services | Forms.

NOTE: Agencies may use their own agency-generated letter template with prior approval from the Division.

- d. Create a new HE+ Program Services referral in the HE+ System.
 - i. Under "Is Agency Denied" click "Yes" and check the appropriate reason.
 - ii. Upload the denial letter into the HE+ system.
 - e. Make detailed HE+ System Notes stating the reason for the denial, when the customer was contacted about the denial, and what other resources were offered to the customer.

NOTE: In situations involving rental denials, the denial letter is required to be mailed to both the landlord and the tenant. HE+ System Notes are required under both the landlord and the tenant's PID.

REMINDER: HE+ Program Services are not an entitlement and decisions are not eligible for appeal.

2. Weatherization Agency Requirements

Applies to: Wx Agency

If a dwelling/unit is determined to be ineligible for HE+ Program Services during or after the initial system assessment, or if the customer has become unresponsive or calls to cancel, the weatherization agency is required to complete all the following steps:

- a. Immediately cease the provision of services.
- b. Provide the customer with a verbal denial (in person or over the phone) within 48 hours of the decision to deny or within 18 hours when there is an urgent safety concern.
- c. Refer the customer to other local entities that may be able to assist.
- d. Mail an HE+ Program Services Denial Notification within two business days indicating the customer's request has been denied and explain the reason for the denial and what other resources may be available to the customer.
 - i. The HE+ Program Services Denial Notification template is available on the [HE+ TTA website](#) under HE+ Program Services | Forms.

NOTE: Agencies may use their own agency-generated letter template with prior approval from the Division.

- e. Deny the referral in the HE+ System.
 - i. If an assessment was done and needs to be paid for, the "Job Kind" should be coded as an "assessment only" and charged appropriately. Make detailed HE+ System Notes and upload the denial letter.



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HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

- ii. If there are no charges to be attached to the job, click “Deny-No Cost”, select the denial reason, add HE+ System Notes, and upload the denial letter in the HE+ System.
- f. Contact the WHEAP agency to inform them of the denial.
- g. Enter detailed HE+ System Notes explaining the reason(s) for the denial, when the verbal denial was provided, the date the denial letter was mailed to the customer, and any additional customer contacts that occurred.
- h. Denied and ‘assessment only’ jobs are required to be closed and/or invoiced in the HE+ System within 30 days of the WHEAP referral.

NOTE: In situations involving rental denials, the denial letter is required to be mailed to both the landlord and the tenant. HE+ System Notes are required to be entered under both the landlord and the tenant's PID.

REMINDER: Agencies are unable to delete HE+ Program Services referrals from the system. Contact the HE+ Help Desk with any deletion requests. Applies to: WHEAP Agency, Wx Agency

NOTE: If the situation is resolved at a later date and the customer remains WHEAP eligible, a new HE+ Program Services referral may be generated by the WHEAP agency.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Chapter 4 | Operational Procedures

Applies to: WHEAP Agency, Wx Agency

4.1 Operational Procedures: WHEAP Agency

Applies to: WHEAP Agency

The WHEAP agency is responsible for using the current program year policy in determining if a household is eligible for HE+ Program Services prior to submitting a referral to the weatherization agency.

4.2 Operational Procedures: Weatherization Agency

Applies to: Wx Agency

1. The weatherization agency is responsible for coordinating the assessment of the affected system, coordinating the installation of repairs and/or replacements as well as any remediation steps with the contractor, conducting an [HE+ Program Services final inspection](#) of replacements, and completing the final invoice in the HE+ System.
2. The weatherization agency is required to ensure priority services and availability of HVAC systems that meet the required standards.
3. The weatherization agency is required to determine for each job whether a repair or replacement is appropriate and enter that information in HE+ System Notes.
4. The weatherization agency is required to perform HE+ Program Services or may subcontract the work to subcontractor(s) selected by competitive bids. See the current program year Weatherization Assistance Program Manual for details on procurement management.
 - a. The weatherization agency is required to enter, update, and review their subcontractors in the HE+ System every program year and whenever changes occur.
 - b. Invoices are required to match the subcontractor's name selected in the HE+ System.
 - c. Agencies must not select work performed "in-house" if the work was completed by a subcontractor.
5. Weatherization agencies may use their staff to complete repairs and replacements after the Division has approved the costing procedure.
6. The weatherization agency is responsible for verifying and uploading homeownership documents for a Weatherization referral (Wx-REF).
 - a. The weatherization agency is required to follow current program year Weatherization homeownership verification policy as described in the Weatherization Assistance Program Manual.
7. The weatherization agency is responsible for appointing an HE+ System/Program Services ["Profile Management Administrator"](#) (PMA) with a written request to the Division via the HE+ Help Desk. The PMA is responsible for:



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

- a. Creation of new, and maintenance of current, HE+ System/WisWAP contacts/permissions/user profile information (including review of the user profile name for appropriateness upon creation) within their agency.
- b. Maintenance of current HE+ System/WisWAP user profiles includes:
 - i. Inactivate user profiles who will be off the system for more than two weeks on vacation, maternity leave, summer leave, or any other reason.
 - ii. Immediately deactivate user profiles who have been terminated, retired, quit, or otherwise have left the program.

Any staff person with a user profile has the responsibility to maintain the confidentiality of their username and password. Usernames and passwords must not be shared with anyone, including other agency staff. The user logged in is responsible for all activity occurring under their user profile. All activity in the system is recorded and time stamped according to the user login.

4.3 Operational Procedures: Coordination between WHEAP and Weatherization Agencies

Applies to: WHEAP Agency, Wx Agency

1. If a non-emergency referral occurs in late August or early September and the service work and invoicing will not be completed prior to the deadline for completion of the current program year work, the following applies:

Weatherization Agency

Applies to: Wx Agency

Weatherization agencies is required to contact their WHEAP agencies with a cut-off date for the current program year HE+ Program Services referrals. This will ensure all outstanding HE+ Program Services jobs are finished and invoiced in time for the final extraction of the current program year. Outstanding HE+ Program Services activity can be found in the HE+ System under “Reports” and then “Pending or On Hold Program Service.”

WHEAP Agency

Applies to: WHEAP Agency

If an HE+ Program Services referral request is made after the established cut-off date, the WHEAP agency is required to assist the customer in completing an early application for the next program year and attach the referral to the customer’s new application.

HE+ System Notes are required to be entered by the WHEAP worker explaining the timeline of events.

It is imperative that Weatherization and WHEAP agencies coordinate on all HE+ Program Services activity to ensure that applicants are eligible for services and that the costing is paid in the correct program year.

Applies to: WHEAP Agency, Wx Agency



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

NOTE: If the customer's eligibility status changes with the new PY application and the customer is no longer WHEAP eligible, contact the HE+ Help Desk for guidance.

2. An HE+ Program Services Contact Information Form is required to 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 forms via an Informational Transmittal prior to the beginning of the program year.
- Applies to: WHEAP Agency, Wx Agency*
- a. A qualified agency representative shall complete the entire form by filling in **all** fields.
- b. WHEAP and Weatherization agencies shall complete a **separate** form for each county/tribe they serve.
 - i. WHEAP agencies are required to provide the following information:
Applies to: WHEAP Agency
 1. Primary HE+ Program Services WHEAP contact,
 2. Secondary WHEAP contact and,
 3. After hours WHEAP contact,
 4. Whether the agency offers space heaters to customers and
 5. Steps to ensure policy timelines are met outside regular business hours, including weekends and holidays.
 - ii. Weatherization agencies are required to provide the following:
Applies to: Wx Agency
 1. Primary HE+ Program Services contact,
 2. Secondary contact,
 3. After hours agency contact,
 4. Primary HVAC heating system contractor,
 5. Primary HVAC cooling system contractor,
 6. Primary water conservation contractor,
 7. Whether the agency offers space heaters to customers and,
 8. Process by which referrals are communicated to contractors.
- c. Any changes or updates to the form must be sent to the [HE+ Help Desk](#) within 3 business days.



Chapter 5 | Technical Specifications

Applies to: Wx Agency

5.1 General

Applies to: HVAC-All, Water Conservation

The intent of the HE+ Program Services is to make decisions related to repairing or replacing a HVAC system or water heater, based on an assessment of the problem, condition, and age of the system.

The guidelines in this chapter mirror the Wisconsin Weatherization Program protocols for decision-making; however, in the case of a weatherization job, the results of electronic modeling would determine the next step.

Weatherization agencies are expected to apply their experience and technical knowledge to the decision to repair or replace, as the agency is responsible for these decisions. If this decision is delegated to a subcontractor or other entity, the agency is required to ensure compliance with requirements and guidelines through a documented [Quality Control System](#).

All work performed is required to meet all local building codes. Agencies must obtain all municipality required permits as applicable. Materials and [appliances](#) must be installed to meet Product Manufacturer Instructions (PMI).

Agencies are required to refer to Section 8.7 of the Wisconsin Weatherization Assistance Program Manual for additional guidance on mechanical systems measures.

5.2 Repairs and Replacements

Applies to: HVAC-All, Water Conservation

For *all* repairs and replacements, the applicant or approved household member is required to agree to the terms of the “HE+ Program Services Customer Agreement Form”, or acknowledge that they deny services by signing and dating the provided form available on the [HE+ TTA website](#) under HE+ Program Services | Forms. Agencies are required to upload the completed form to the HE+ System.

[Digital signatures](#) with a time stamp are allowed.

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.

5.2.1 Repair and Replacement Cost Limits

Applies to: HVAC-All, Water Conservation

1. Total costs for HE+ HVAC Program Services must not exceed \$12,000 per job. 
Applies to: HVAC-All
2. Total costs for HE+ Water Conservation Program Services must not exceed \$6,000 per job.



Applies to: Water Conservation



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

- a. Maximum funds are reserved in the HE+ System when referrals are entered.
3. The Division conducts monitoring of job costs throughout the program year and may request more information from the weatherization agency when job costs exceed the maximum amount allowed.
 - a. The weatherization agency is required to respond and/or make the information available upon request within the required timeline.
4. When the maximum costs for HE+ Program Services measures are exceeded, the weatherization agency will need to request an override from the Division.
 - a. The weatherization agency will be prompted in the HE+ System to list the reason(s) for the overage. The weatherization agency is expected to give a detailed summary (see screenshot below).

- b. The Division may request additional information or deny any override request where detailed reasons for the overage are not provided.
See tables below for specific cost limits.

Table 5.1 HE+ HVAC Heating Program Services Measure Cost Limits

Applies to: HVAC-Heating

HE+ HVAC Heating Program Services Cost Limits		
Heating System Assessments		
Measure Code	Description	Cost Maximum
EFAS005	Heating system Assessment	\$300
Heating System Repairs		
Measure Code	Description	Repair Cost Maximum
EFRR005	Boiler Repair or Modification	\$1,500
EFRR010	Boiler Radiator, Repairs or Modifications	\$1,500
EFRR015	Heating system Repair or Modification	\$1,000
EFRR020	Heating Ducts Repair, Replace or Modify	\$1,500
EFRR025	Space Heater Repairs or Modifications	\$1,000
EFRR030	Clean and Tune	\$500



HVAC-A/C



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

HE+ HVAC Heating Program Services Cost Limits		
Heating System Replacements		
Measure Code	Description	Replacement Cost Maximum
EFRT005	Gas Boiler	\$10,000
EFRT007	Gas Boiler - ENERGY STAR®	\$10,000
EFRT009	Gas Forced Air 95%	\$7,500
EFRT010	Gas Space Heater or Wall Heating system	\$6,000
EFRT015	Oil Boiler	\$10,000
EFRT020	Oil Forced Air	\$7,500
EFRT025	Pellet Stove*	\$6,000
EFRT035	Oil Boiler - ENERGY STAR®	\$10,000
EFRT040	Oil Forced Air - ENERGY STAR®	\$7,500
EFRT045	Wood Forced Air*	\$6,000
EFRT050	Gas Mobile Home 95%	\$7,500
EFRT055	Gas Mobile Home	\$7,500
Heating System Fuel Switching Collateral		
Measure Code	Description	Cost Maximum
EFRT060	Fuel Switching	\$500

**NOTE: Prior approval from the Division is required before installing any wood-burning heating systems. The measure can only be activated by Division staff. Contact the HE+ Help Desk before any work is started for approval.*

Table 5.2 HE+ HVAC A/C Program Services Measure Cost Limits 🔥

Applies to: HVAC-A/C

HE+ HVAC A/C Program Services Cost Limits		
A/C System Assessments		
Measure Code	Description	Cost Maximum
ECAS005	A/C Assessment	\$300
A/C System Repairs		
Measure Code	Description	Repair Cost Maximum
ECRR005	Central A/C Repair	\$1,500
ECRR015	Recharge Service	\$500
ECRR020	Ducts Repair, Replace or Modify	\$500
ECRR030	Clean and Tune	\$500
A/C System Replacements		
Measure Code	Description	Cost Maximum
ECRT005	Central A/C	\$7,000
ECRT025	HVAC Mobile Home A/C Replace	\$7,000



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Table 5.3 HE+ Water Conservation Program Services Measure Cost Limits

Applies to: Water Conservation

HE+ Water Conservation Program Services Cost Limits		
Water Conservation Assessments		
Measure Code	Description	Cost Maximum
WCAS005	Water Assessment	\$300
Water Conservation Repairs		
Measure Code	Description	Repair Cost Maximum
WCRR005	Water Heater Repair	\$1,500
WCRR010	Plumbing Repair	\$1,500
Water Conservation Replacements		
Measure Code	Description	Replacement Cost Maximum
WCRT005	Gas power vent from conventional gas	\$3,500 Mobile or Manufactured Home: \$1,900
WCRT010	Gas power vent from electric	\$3,500 Mobile or Manufactured Home: \$3,000
WCRT015	Gas, conventional from electric	\$3,000 Mobile or Manufactured Home: \$1,600
WCRT022	Oil to Gas	\$3,500
WCRT030	Tankless On Demand Gas	\$1,900
WCRT035	Indirect Fired Water Heater	\$3,500
WCRT040	Plumbing Replace	\$6,000 Mobile or Manufactured Home/2-4 Unit: \$1,500
WCRT045	Electric to Electric	\$2,500
WCRT050	Gas Direct Vent	\$3,500

5.3 Choosing Whether to Repair or Replace

Applies to: HVAC-All, Water Conservation

The HVAC system and/or water heater should be repaired when it is a reasonable and appropriate solution to the situation. The weatherization agency is responsible for determining the most reasonable course of action and making a recommendation to the Division if a waiver is necessary. The following requirements apply:

1. Only approved HVAC systems and water heater may be repaired or replaced in a unit.

EXCEPTION: When the heating system is room/space heaters. See requirements for space heater replacement in [Section 5.6](#).

Applies to: HVAC-Heating

2. If repair costs are expected to exceed the repair limit and the estimated useful life is less than five years, the system is required to be replaced in most cases.
 - a. Contact the HE+ Help Desk when questions arise about replacement versus repair.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

3. Existing systems that have a standing pilot ignition and have exceeded their useful life must be replaced.
4. If repairs of an electric heating system or approved water conservation system are expected to exceed the repair limit, the electric system is required to be replaced with a non-electric system. 🔥💧

Applies to: HVAC-Heating, Water Conservation

NOTE: If it is not feasible to replace with a non-electric system, contact the HE+ Help Desk to request a waiver.

NOTE: Portable, stand-alone space heaters and/or unvented space heaters are not eligible for repair or replacement through HE+ HVAC Program Services. 🔥

Applies to: HVAC-Heating

5.4 Technical Specifications 🔥💧

Applies to: HVAC-All, Water Conservation

The repaired or replaced system is required to be installed per manufacturer's instructions. For exact technical specifications, see Attachment 4 – Technical Specifications for Heating and Cooling System Work for the Wisconsin Weatherization Assistance and Home Energy Plus (HE+) HVAC Program Services available on the [HE+ TTA website](#) under Weatherization | Procurement | Category 6: Services, Attachment 4 – Specifications HVAC.

NOTE: In situations where a system meeting the efficiency guidelines is not safe for the size of the space/dwelling, or in other extraordinary circumstances, the weatherization agency may request a waiver by contacting the HE+ Help Desk.

1. The weatherization agency is required to follow the same technical specifications and decision-making protocols as outlined under the Wisconsin Weatherization Assistance Program (WAP), with the addition of timeline requirements as identified for WHEAP agency referrals (emergency and non-emergency).
2. Documentation is required to be retained by the weatherization agency to demonstrate compliance with technical and decision-making requirements. A documented [Quality Control System](#) for contracted work is required. When a weatherization agency chooses to delegate decision-making to their HVAC contractor regarding the decision to replace or repair, the documented Quality Control System must address this activity.

When considering the repair or replacement of an air source heat pump, the weatherization agency is required to review the [Air Source Heat Pump \(ASHP\) Consideration Flow Chart](#) to determine if the customer is a good candidate.

NOTE: Prior approval from the HE+ Help Desk is required before repairing or replacing an air source heat pump.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

5.4.1 System Repair Guidelines

Applies to: HVAC-All, Water Conservation

1. HE+ HVAC Program Services repair activities may include, but are not limited to, the following: 

Applies to: HVAC-All

- a. Starting mechanism repair,
 - b. Limit switch repair,
 - c. Thermostat repair,
 - d. Blower component repair,
 - e. Boiler radiator repair or modification,
 - f. Duct repair or modification,
 - g. Clean and tune,
 - h. Recharge service (HVAC A/C),
 - i. Central A/C repair.
2. HE+ Water Conservation Program Services activities *may* include, but are not limited to, the following: 

Applies to: Water Conservation

- a. Water heater repair or replacement.
- b. Collateral work necessary to ensure the unit is installed per manufacturer's instructions and can operate successfully (i.e., floor repairs, shut off valves for other leaks, etc.).

5.4.2 System Replacement & Installation Guidelines

Applies to: HVAC-All, Water Conservation

When replacing or installing an HVAC system or water heater, the following requirements is required:

1. The applicant or approved household member must agree to the terms of the "HE+ Program Services Customer Agreement Form", or acknowledge that they deny services, by signing and dating the provided form, available on the [HE+ TTA website](#) under HE+ Program Services | Forms. Digital signatures with a time stamp are allowed.
2. The existing system being replaced must be removed from the property and disposed of properly when applicable.
 - a. In electric heating system conversions, the Division recommends disconnecting the existing baseboard units at the service panel and leaving them in place. 

Applies to: HVAC-Heating

NOTE: There may be other situations where it is acceptable to leave the system in place. The weatherization agency is required to contact the HE+ Help Desk to request a waiver.

3. Replacement is required to be a reasonable and appropriate solution to the situation.
 - a. If a repair was made to the system, subsequent service call cost repair estimates is required to be combined with the previous repair amount and if the cost of the



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

second repair would exceed maximum cost limits for repair, then the system should be replaced. For an exception, contact the HE+ Help Desk to request a waiver.

4. Heating system replacements are allowed only for systems utilizing the primary fuel type reported on the current year HE+ Application. 🔥

Applies to: HVAC-Heating

EXCEPTION: Fuel type may be changed during the fuel switch process (see [Section 5.5](#)).

5. The weatherization agency or its subcontractor is required to determine what type of A/C system to install for households based on the HVAC A/C assessment. The household must meet all other HE+ Program Services eligibility. 💧

Applies to: HVAC-A/C

6. Once a replacement job is completed and passes the HE+ Program Services final inspection, any additional work on the system is required to be covered as part of the one-year warranty. If the HE+ Program Services final inspection results in a callback, the warranty does not start until the date the issue has been resolved.

- a. Any identified re-work that is generated from a quality assurance inspection performed by the Division will not be reimbursed by the program.
- b. The total cost including any necessary collateral activities must not exceed the replacement limit specified for the [system type](#) unless approved in advance by requesting a waiver from the HE+ Help Desk.

7. 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.

5.4.3 HE+ Program Services Final Inspection 🔥💧

Applies to: HVAC-All, Water Conservation

The local weatherization agency, or its procured subcontractor, is required to 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 Product Manufacturer instructions.

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.*

1. As part of the HE+ Program Services final inspection, the weatherization agency, or its procured subcontractor, is required to fully complete the replacement HVAC system checklist and/or water heater installation checklist upon the HE+ Program Services final inspection.
2. HE+ Program Services final inspection checklists are located on the [HE+ TTA website](#) under HE+ Program Services | Forms, and include:
 - Replacement Air Conditioner Checklist,
 - Replacement ASHP Checklist,
 - Replacement Boiler Checklist,
 - Replacement Gas Checklist,



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

- Replacement Oil Checklist,
 - Replacement Water Heater Checklist.
3. The final inspection can be conducted immediately following the completion of the installation.
 4. The inspector/installer and the customer (or household member aged 18 or over) must both sign the fully completed HE+ Program Services final inspection checklist.

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.

5.4.4 Collateral Activities

Applies to: HVAC-All, Water Conservation

Collateral work associated with a HVAC or approved water heater replacement is required to be approved by the weatherization agency and must be included in the cost of the total job.

Collateral activities include:

1. Building permits.
 - a. Replacement checklists 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 must check the box.
 - b. Leaving the box unchecked indicates a permit is not required from the municipality.
 - c. Checklists are located on the [HE+ TTA website](#) under HE+ Program Services | Forms.

NOTE: The building permit is not the responsibility of the applicant household or building owner. The weatherization agency must ensure that applicable permits are obtained and include the cost as a collateral cost.
2. Pre-approved electrical work.
3. Distribution improvements.
4. Necessary chimney repairs. This may include chimney liners, or a chimney stack assist kit to ensure adequate draft. The repairs are required to meet all safety standards or code.
5. Necessary asbestos abatement.
 - a. The weatherization agency is required to ensure the asbestos is addressed and the abatement performed by trained and certified (if required) individuals.

6. Decommissioning of fuel oil tank.

Applies to: HVAC-Heating

7. Ductwork necessary to achieve the required temperature rise for the heating system.

Applies to: HVAC-Heating

NOTE: If all other adjustments (i.e., gas pressure, O₂) do not bring the installed heating system’s temperature rise into the heating system’s manufacturers’ specifications, the weatherization agency is required to request a waiver by contacting the HE+ Help Desk.

8. Other pre-approved measures. Contact the HE+ Help Desk prior to starting any additional work.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

5.5 Primary Fuel Switch

Applies to: HVAC-All, Water Conservation

A primary fuel switch is required to be considered with all HE+ Program Services replacements. Any fuel switch is required to first be reviewed for possible weatherization.

Switching of fuel types is allowed under the following circumstances:

1. The non-working or unsafe system uses wood, pellet, or coal and the applicant is elderly or disabled and physically unable to continue to use the primary fuel source.

NOTE: If the primary system is working and safe but the applicant is no longer able to continue using the primary fuel source, the referring agency is required to contact the HE+ Help Desk and request a waiver prior to completing a HE+ Program Services referral.

2. Chimney repair costs would result in higher total project cost than the installation of propane (LP) or natural gas.
3. Natural gas infrastructure is located within 60 feet of the dwelling unit and the homeowner is willing to incur any additional cost of piping the gas to their home, or natural gas or propane (LP) is presently being used for other purposes within the home, or it is feasible to install a propane (LP) tank and lines.

NOTE: If the customer is unable to pay the additional cost for lateral installation, contact the HE+ Help Desk for additional guidance.

4. 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 heating system or water heater to natural gas as a repair.
5. Fuel switches can be performed when a natural gas main is extended to new territory and/or a new lateral is installed from the main to a building. See the Fuel Switch Policy heading on the [HE+ TTA website](#) under Weatherization | Resources | Energy Auditing for additional guidance for conversion or replacement.

NOTE: In the case of a non-emergency fuel switch when the main and/or lateral natural gas lines have not been installed, or the propane tank hasn't been set, the job must be denied by the weatherization agency and the customer advised to call their WHEAP agency when the installation is complete to request a new referral. Deferrals of HE+ Program Services are not allowed.

6. The existing system is electric and needs to be replaced with a non-electric unit.

NOTE: In electric heating system conversions, the Division recommends disconnecting the existing baseboard units at the service panel and leaving them in place.

5.5.1 Additional Guidance on Primary Fuel Switches

Applies to: HVAC-All, Water Conservation

1. Replacement or conversion of cook stoves or dryers is not allowed with HE+ Program Services funds. If no other resources are available, the customer must arrange and pay for these existing appliances to be replaced or converted to natural gas.
2. The maximum allowable expenditure for collateral activities associated with a fuel switch project is \$1,500.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

- a. These are costs that are related to fuel switching that are not part of the base bid price for installing the system.
- b. Examples include oil tank capping or removal, gas lines, orifice replacement, and ductwork when needed for electric conversions.

NOTE: If the fuel switching collateral costs are estimated to exceed \$1,500, the agency is required to contact the HE+ Help Desk and receive approval from the Division prior to proceeding with the fuel switch.

5.6 Guidance on Portable Space Heater Replacement

Applies to: HVAC-Heating

Unvented space heaters present an urgent safety concern for household occupants.

1. When the weatherization agency or its subcontractor finds an unvented space heater in a home, the customer must be encouraged to have the unit removed or disabled immediately.
2. The weatherization agency is required to follow up with an agency-generated letter to the customer notifying them of the hazards and risks involved with using an unvented space heater.
3. A copy of the letter is required to be uploaded into the HE+ System.

When there are two existing space heaters that each have less than five years of useful life remaining, consider replacing those units with a forced-air heating system. This installation requires prior approval. To obtain prior approval, the weatherization agency is required to submit a request to the HE+ Help Desk. The following information is required to be included in the request:

- The estimated or actual steady-state efficiency of the existing space heaters,
- The cost of replacing both space heaters,
- The AFUE rating (per [AHRI](#)) of the replacement space heaters,
- The total cost of installing a forced-air heating system, and
- The AFUE rating (per AHRI) of the replacement forced-air heating system.

5.7 HE+ Program Services and Weatherization

Applies to: Wx Agency

To address questions pertaining to weatherizing a dwelling referred by the WHEAP agency for HE+ Program Services, the weatherization agency is required to identify if the referral is for a dwelling that was previously weatherized.

When system assessments are performed by a contractor and a replacement is required, the weatherization agency and/or contractor is required to develop a protocol to ensure that the potential for full weatherization is considered, and the replacement is sized accordingly.



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Chapter 6 | File Documentation and Uploads

Applies to: WHEAP Agency, Wx Agency

Refer to program policies in the current program year Weatherization Assistance Program Manual or WHEAP Manual to determine the document retention and applicant confidentiality requirements for HE+ Program Services files.

Document upload requirements associated with HE+ Program Services referrals originated by the weatherization agency is required to follow Weatherization record retention policies and HE+ Program Services referrals originated by the WHEAP agency is required to follow WHEAP record retention policies.

6.1 File Documentation and Uploads: WHEAP Agency

Applies to: WHEAP Agency

File requirements will vary according to the type of referral made to perform the service work.

6.1.1 HE+ Program Services Referrals

Applies to: WHEAP Agency

HE+ Program Services referrals have the following WHEAP agency file requirements:

1. Proof of homeownership uploaded into the HE+ System.

NOTE: All verification of homeownership documentation must show a member of the household is the current homeowner (in the current program year). Verification documentation provided from previous years may not be used.

NOTE: WHEAP agencies are not required to keep a paper file of the documents uploaded into the HE+ System.

6.2 File Documentation and Uploads: Weatherization Agency

Applies to: Wx Agency

File requirements will vary according to the type of referral made to perform the service work.

6.2.1 All HE+ Program Services Repairs and Replacements

Applies to: Wx Agency

The following documents must be uploaded into the HE+ System:

1. Copy of the fully completed and signed HE+ Program Services Customer Agreement Form. The applicant or approved household member is required to agree to the terms of the “HE+ Program Services Customer Agreement Form”, or acknowledge that they deny services by signing and dating the provided form available on the [HE+ TTA website](#) under HE+ Program Services | Forms. Digital signatures with a time stamp are allowed.
 - a. The form is required to be uploaded under “Other Job-Related Documents.”
2. Copy of the contractor’s itemized invoice(s).
 - a. Upload the document under “PS Contractor’s Itemized Invoice.”
3. Required photographs.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

The following photos are required to be uploaded in the HE+ System under the “Program Service Photos” repository:

- a. The existing system conditions,
- b. The manufacturer’s existing name plate,
- c. Installer’s information, contact number, and date of installation (replacements only),
- d. The instruction manual left by the contractor (replacements only),
- e. Any other necessary documents indicating the problem or condition of the existing heating system prior to the provision of services (if applicable),

*NOTE: Required photos must be uploaded to Program Service Photos in the HE+ System. Additional photos that are **not required** can be uploaded under Job Other.*

6.2.2 Additional Document Requirements for Replacements

Applies to: Wx Agency

For replacements, the following documents are required to be uploaded into the HE+ System:

1. All HVAC and water heater replacements are required to meet the minimum Wisconsin Weatherization Assistance Program efficiency standards and the [AHRI Directory of Certified Product Performance](#) standards.
2. The AHRI certificate is required to be uploaded to the HE+ System under the associated repository for all HVAC and water heater replacements.

NOTE: Prior approval from the Division is required before installing any wood-burning heating systems. The measure can only be activated by Division staff. Contact the HE+ Help Desk before any work is started for approval.

3. Copy of the appropriate system replacement checklist fully completed and signed by the subcontractor and the customer.
4. Copy of building permit(s), if required by local government
 - a. If a paper permit is not issued by the local jurisdiction, then a copy of the receipt for payment is acceptable documentation.
5. Documentation of the sizing calculation for replacement HVAC systems. Acceptable sizing calculations are REScheck™, ACCA Manual J, or an ACCA-approved sizing formula, if applicable. 

Applies to: Wx Agency

6. For denials, a copy of the weatherization agency’s letter of denial sent to the customer.

REMINDER: Agencies are unable to delete HE+ Program Services referrals from the system. Contact the HE+ Help Desk with any deletion requests.

6.2.3 HE+ Program Services Weatherization Referrals (Wx-REF)

Applies to: Wx Agency

In addition to the items listed in [Section 6.2.1](#), include:



HVAC-A/C



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1. Proof of homeownership is required to be uploaded into the HE+ System.
NOTE: Verification of homeownership must be obtained each time HE+ Program Services are requested. Verification documentation provided before the customer has reported a 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).
2. Evidence documenting that the existing system meets program requirements, and the reason why the repair or replacement of the system cannot be included in the weatherization of the home.
NOTE: In situations involving ALL rental units, the weatherization worker must contact the HE+ Help Desk for approval prior to requesting a Wx-REF be created by the WHEAP worker.

6.3 HE+ Program Services Quality Assurance (PSQA) Requirements

Applies to: WHEAP Agency, Wx Agency

HE+ Program Services Quality Assurance practices are intended to review accuracy of current program year HE+ HVAC and Water Conservation Program Services referrals and cases.

6.3.1 WHEAP Agency PSQA Requirements

Applies to: WHEAP Agency

The contracted agency is responsible for participating in internal Program Services Quality Assurance activities. Program Services Quality Assurance practices are intended to review accuracy of current program year HE+ HVAC Program Services and Water Conservation Program Services referrals and cases. Local WHEAP agencies are required to develop and implement a Program Services Quality Assurance Plan for HE+ HVAC Program Services repair/replacements and HE+ Water Conservation Program Services activities. The WHEAP agency is required to maintain a file with a copy of the plan and the results of the internal review. The written plan is required to include procedures for HE+ Program Services case quality assurance review including:

1. Staff responsible for case review,*
2. How cases are selected for review,**
3. How often reviews occur during the program year.

**The local WHEAP agency worker who processed and/or verified the information associated with the HE+ HVAC Program Services and/or water conservation application under review cannot conduct quality reviews of the selected application.*

***Cases selected for the agency internal PSQA review must be different from those selected for General Quality Assurance (GQA) review.*

WHEAP agencies must 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.

Each of the two rounds of reviews must be conducted as follows:



- Agencies with a prior year caseload of 5,000 or greater must select:
 - 6 HVAC cases,*
 - 3 Water Conservation cases,*
- Agencies with a prior year caseload of fewer than 5,000 must select:
 - 2 HVAC cases,*
 - 1 Water Conservation case,*

*Contact the HE+ Help Desk if the required number of cases are not available by each deadline.

1. The review must also include the original or “parent” HE+ Application associated with the HE+ Program Service(s) to ensure that eligibility and benefits were accurately determined.
2. WHEAP agencies are required to upload each completed internal PSQA Review to their current WHEAP contract in the HE+ System within 3 business days of the January 31 and May 31 deadline(s).
3. All agencies are required to use the Division HE+ Program Services Quality Assurance tool.
4. At the time of the review, the agency reviewer is required to add HE+ System Notes to each HE+ Program Services case, identifying it as having been reviewed.

6.3.2 Weatherization Agency PSQA Requirements

Applies to: Wx Agency

The contracted agency is responsible for participating in Division-conducted Desktop Monitoring (DTM) HE+ Program Services Quality Assurance (PSQA) activities. This review is not a replacement for an on-site review, but rather a means to ensure that agencies are correctly interpreting and applying HE+ Program Services requirements and policies. [Training and Technical Assistance](#) sessions **are required** as a result of the monitoring activities.

Weatherization agencies are required to:

- Respond to all agency-required case corrections within the timeframes established by Division staff.
- Implement training at the local level based on DTM observations and Division staff recommendations and/or make agency staff available for training as directed by Division staff.
- Submit documents requested by the Division by the deadline established by Division staff.
- Attend scheduled Training and Technical Assistance sessions led by Division staff.
- Ensure that all individuals whose attendance has been requested by Division staff are present at specified times as determined by the Division.

6.4 Handling Sensitive Data

Applies to: WHEAP Agency, Wx Agency

An agency must not use [confidential information](#) for any purpose other than the limited purpose of their contract and must not disclose such confidential information to any person other than those who have a business-related need to have access to such information. An agency is required to



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

ensure program employees, both internal and subcontracted, are required to take reasonable efforts to protect and secure sensitive information.

Sensitive data is 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.



Chapter 7 | Processing Referrals

Applies to: WHEAP Agency, Wx Agency

WHEAP and weatherization agencies are required to follow these guidelines to generate referrals, update referrals, and invoice jobs for HE+ Program Services system repairs or replacements. HE+ Program Services repair or replacement expenses are paid directly to the weatherization agency coordinating the service. The completed referral action reserves funds based on the selected system type for the applicant's HE+ Program Services job.

7.1 General

Applies to: WHEAP Agency, Wx Agency

Funds for HE+ Program Services are available on a first-come, first-serve basis and there is a possibility that the funds will be depleted.

HE+ Program Services job details will be completed by the Weatherization grantee, who will enter system details, job costs, and mark “ready for invoice” when the job is completed.

7.1.1 Updating Parent Applications

Applies to: WHEAP Agency

HE+ Program Services applications are linked with the current year WHEAP application, sometimes referred to as a “parent” application. HE+ Program Services [request date](#) and service date must be subsequent to the parent application's “application date.”

Program eligibility must be determined, and addresses must be confirmed prior to creating any Program Services referrals.

If the WHEAP agency discovers an error, or the applicant is suspected of fraud, contact the HE+ Help Desk and the weatherization agency immediately to ensure the contractor's work does not continue. Detailed HE+ System Notes are required.

Failure to notify the weatherization agency in a timely manner may result in a WHEAP agency repayment of HE+ Program Services.

1. The HE+ System does not allow edits to the address on an unextracted parent application after a Program Services referral has been submitted.
 - a. Anytime the parent application has been updated after a Program Services referral has been submitted, the HE+ System will place a hold on the referral and the building.
 - b. In situations where an address needs to be corrected on the parent application, agencies will need to notify the weatherization agency of this change and contact the HE+ Help Desk to have the referral deleted.
 - c. Once the referral has been deleted, the HE+ System will allow the correction on the parent application, and a new referral can be submitted.
 - d. Notification to the weatherization agency is required to avoid duplicate efforts in sending contractors to the customer's home.



HVAC-Air



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency

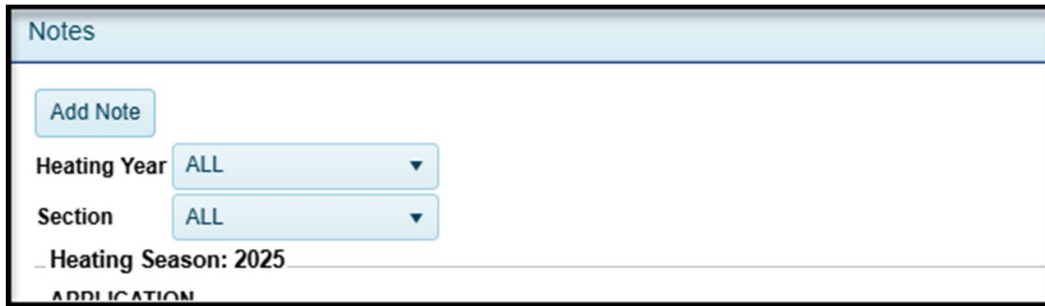


Wx Agency

7.2 Generating Referrals and Reserving Funds: WHEAP Agency

Applies to: WHEAP Agency

1. Prior to submitting a referral, the WHEAP worker is required to review all HE+ System Notes related to the household. **Workers can access all HE+ System Notes (Program Services, Job, Crisis, etc.) by selecting "All" from the "Heating Year" and "Section" drop-downs in the Notes function.**



- a. If the customer has been denied in the past by the weatherization agency, the WHEAP worker is required to contact the weatherization agency to discuss the referral.
2. The WHEAP agency must confirm that the property owner's Certification Page is compliant with current WHEAP policy, and that homeownership records and tax forms have been uploaded in the HE+ System.

REMINDER: The address on the HE+ Program Services referral must match the address on the HE+ Application. If the address is incorrect, a new HE+ Application is required to be created.

3. For WHEAP-generated HE+ Program Services referrals it is the WHEAP worker's responsibility to upload the homeownership verification to the HE+ System.
4. For Weatherization referrals (Wx-REF) it is the weatherization agency's responsibility to verify and upload homeownership documents. 

Applies to: Wx Agency

NOTE: In situations involving ALL rental units, the weatherization worker must contact the HE+ Help Desk for approval prior to requesting a Wx-REF be created by the WHEAP worker.

NOTE: Verification of current homeownership must be obtained each time HE+ 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).  

Applies to: WHEAP Agency, Wx Agency

5. When entering HE+ Program Services referrals into the system, the WHEAP worker is required to 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.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

- a. HE+ Program Services referrals 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 applications.
6. Once the HE+ Program Services referral is saved with “Ready for Referral” checked, the referral cannot be deleted by the WHEAP agency.
7. If the WHEAP worker generates an HE+ Program Services referral email to the weatherization agency that is denied due to lack of funds (or any other reason), the WHEAP worker is required to immediately contact the weatherization agency to inform them the referral has been denied.
 - a. The WHEAP worker is required to update HE+ System Notes to include who they spoke with at the weatherization agency about the denial. Denial of services notifications apply.
 - b. Failure to follow these directives may result in the WHEAP agency being assessed with the costs associated with the referral.

7.3 Receiving, Updating, and Invoicing Referrals: Weatherization Agency

Applies to: Wx Agency

- The weatherization agency is required to create a Job ID and enter HE+ System Notes within three business days of all referral receipts.
NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes explaining the delay are required.
- See [Section 2.1.5](#) for weatherization agency response requirements for HE+ Program Services referrals.
- **All jobs must be invoiced in the HE+ System within 30 calendar days of the service date.**
 - When [partial invoicing](#), the agency is required to use the date the final measure has been invoiced and add detailed HE+ System Notes.
- The weatherization agency is required to invoice the HE+ Program Services job after a final invoice with all required information and documentation has been received from the contractor and after the HE+ Program Services final inspection for replacements has been conducted and passed.
 - Supporting file documentation for the invoice is required to include itemization documentation for any system assessment, trip charge, or collateral work and any job cost reduction (less any incentives or rebates on equipment/services from other sources).
 - Items not included on the invoice when submitted will be handled through monthly HE+ Program Services invoices for program support and administration. Retain documentation for file.
- For Wx-REFs, the weatherization agency is responsible for verifying and uploading homeownership verification into the HE+ System before any work is started (see [Section 6.2.1](#)).



HVAC-A/C



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

7.3.1 HE+ Program Services System Repair Payment

Applies to: Wx Agency

Payment for a system repair must not be made until the weatherization agency has an invoice with the costs itemized as the total cost of the repair and/or system assessment (one total cost).

Weatherization operator Administration cost and Program Support is required to be invoiced using the monthly HE+ Program Services invoice.

7.3.2 HE+ Program Services System Replacement Payment

Applies to: Wx Agency

Payment for a system replacement must not be made until the weatherization agency has received an invoice with the costs itemized as the total cost of the replacement. Using a proposal, estimate, or bid is not allowed. Weatherization operator Administration and Program Support cost from the weatherization agency is required to be invoiced by the 15th of each month.

When collateral items cannot be completed at the same time as the replacement, due to outdoor conditions for example, the contractor is required to invoice the weatherization agency for the amount needed to complete the work.

The weatherization agency must not pay out that portion of the invoice to the subcontractor until the installation is completed. Work that may fall into this category includes, but is not limited to, charging refrigerant and converting LP gas valves/orifices to natural gas due to a fuel switch.

7.3.3 HE+ Program Services Assessment Payment

Applies to: Wx Agency

If a system assessment does not result in a repair or replacement, the labor or trip charge will be categorized as an “assessment only” and should be invoiced in the HE+ system.

Any Administration or Program Support charges related to the assessment only must be invoiced in the monthly HE+ Program Services invoice, not per job.

Payment for an “assessment only” must not be made until the weatherization agency has received the invoice for the system assessment or trip charge and information explaining the reason for denial of services.

7.4 HE+ System Notes

Applies to: WHEAP Agency, Wx Agency

Entering detailed System Notes in the HE+ System is the best way to ensure communication between WHEAP and weatherization workers as well as our customers. System Notes are required in several situations throughout the program.

The following are instances where System Notes are required by policy. Anytime there is additional information to be shared, System Notes are required to be made.



HVAC-A/C



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

7.4.1 HE+ Program Services System Notes: WHEAP Requirements

Applies to: WHEAP Agency

When generating HE+ Program Services referrals, the WHEAP worker will see auto-populated questions for the customer on the main screen of the HE+ Program Services referral.

1. Is this an Urgent Safety Concern?
2. What is the reported problem? (Please include system type: air control, boiler, natural gas furnace, water heater, etc.)
3. Describe any conditions in the home that may prevent the contractor from assessing the HVAC and/or Water Heater system? (Example: Pets, blocked entry, rooms that are closed off, broken steps, etc.)
4. When was the last time the HVAC and/or Water Heater system was working?
5. What is the current temperature in the home?
6. What provisions were taken to verify the well-being of the residents?

REMINDER: The auto populated HE+ System Notes questions must be answered and must NOT be deleted. Workers are required to answer ALL questions when sending an HE+ Program Services Referral. To ensure the system-generated email formats correctly, press "Enter" between each question. An example of HE+ Program Services Notes with sample responses (highlighted gray) is shown in the following image:

***Notes**

1. Is this an Urgent Safety Concern? Please explain. Test Answer
2. What is the reported problem (please include system type)? Test Answer
3. Describe anything that may prevent the contractor from assessing the HVAC and/or Water Heater. Test Answer
4. When was the last time the HVAC and/or Water Heater was working? Test Answer
5. What is the current temperature in the home (HVAC only)? Test Answer
6. What provision were taken to verify the well-being of the residents? Test Answer

Please note that the original HE+ System Notes feature () is still functional. Notes entered here are included in the auto-populated notes and associated email if added before the referral is sent.

NOTE: Agencies offering space heaters to customers are required to have the customer sign a liability waiver educating the customer about the risks associated with operating space heaters. A copy of the Space Heater Waiver can be found on the [HE+ TTA website](#) under HE+ Program Services | Forms. There should be two copies of the waiver for each customer. One for the customer to keep and one for the customer to sign and return to the agency. The signed document is required to be uploaded in the HE+ System. Digital signatures with a time stamp are allowed.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

7.4.2 HE+ Program Services System Notes: Troubleshooting

Applies to: WHEAP Agency

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.

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.

Table 7.1 Suggested Troubleshooting Questions by Referral Type

Referral Type	Troubleshooting Questions
HVAC – Heating System  <i>Applies to: HVAC-Heating</i>	• Is there power to the system? ○ Has electricity been disconnected? ○ LP or fuel oil: Is there fuel in the tank? • Is the thermostat set to “heat”? • Have the thermostat batteries been changed? • Are there any obstacles around the vents and registers? • Have the circuit breakers and on/off switch been checked? • Has the filter been changed (if applicable)?
HVAC Air Control  <i>Applies to: HVAC-A/C</i>	• Is there power to the system? ○ Has electricity been disconnected? • Is the thermostat set to “cool”? • Have the thermostat batteries been changed? • Are there any obstacles around the vents and registers? • Have the circuit breakers and on/off switch been checked? • Has the filter been changed (if applicable)?
Water Conservation – Water Heater  <i>Applies to: Water Conservation</i>	• Is there power to the system? ○ Has electricity been disconnected? ○ LP or fuel oil: Is there fuel in the tank? • Have the circuit breakers and on/off switch been checked? • Is the exhaust pipe covered or blocked in any way? • Has the water heater been turned off and then turned on again? See Appendix C for a Water Heater Referral Troubleshooting informational sheet.

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.

7.4.3 HE+ Program Services System Notes: Weatherization Referrals (Wx-REF) WHEAP Requirements

Applies to: WHEAP Agency

For Weatherization referrals (Wx-REF), the WHEAP worker is required to document that the referral is a Wx-Ref and then enter the name of the Wx agency and Wx worker who requested the referral in HE+ System Notes.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

*Request Date	4/8/2024
*Service Type	HVAC
*Referral Type	Wx
Program Service Status	Application Started
Is Ownership Type Verified	No
Fuel Type	Propane (LP)
Vendor Name	14 - North Central CAP, Inc.-PrgSrv
Amount Reserved	\$8500
*Notes	1. Is this an Urgent Safety Concern? Please explain. This is a Wx-Ref requested by John Doe of ABC Weatherization Agency. 2. What is the reported problem (please include system type)? 3. Describe anything that may prevent the contractor from assessing the HVAC and/or Water Heater. 4. When was the last time the HVAC and/or Water Heater was working? 5. What is the current temperature in the home (HVAC only)? 6. What provision were taken to verify the well-being of the residents?

REMINDER: When entering HE+ System Notes for HE+ Program Services referrals, the WHEAP worker is reminded that the most recently saved HE+ System Note is the only text included in the referral email to the weatherization agency.

7.4.4 HE+ Program Services System Notes: Weatherization Requirements

Applies to: Wx Agency

The weatherization agency is required to create a Job ID and enter initial HE+ System Notes within three business days of all referral receipts.

NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes are required to be made in the HE+ System explaining the delay within three business days of the referral.

The weatherization agency is required to include the following in HE+ System Notes:

1. Detailed explanation of the HVAC system and/or water heater issue.
2. Estimated age of the system.
3. What the plan is to either repair or replace the system.
4. If the weatherization agency or their contractor offered space heaters to the customer, HE+ System Notes are required to include whether the customer accepted the offer and how many space heaters were provided.
 - a. **NOTE:** Agencies offering space heaters to customers are required to have the customer sign a liability waiver educating the customer about the risks associated with operating space heaters. A copy of the Space Heater Waiver can be found on the [HE+ TTA website](#) under HE+ Program Services | Forms. The signed document



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

is required to be uploaded in the HE+ System. Digital signatures with a time stamp are allowed.

5. If any timeline requirements are exceeded, the weatherization agency is required to document in HE+ System Notes all of the following:
 - a. The reason for the delay.
 - b. Verification of the well-being of the residents.**
6. Job updates.
7. All denial updates.
8. Other pertinent updates regarding the customer's referral.



Chapter 8 | Cost Requirements/Monthly Invoicing 🏠

Applies to: Wx Agency

This chapter provides guidance to weatherization agencies for applying costs to HE+ Program Services.

8.1 Monthly Invoicing for Program Support and Administrative Expenses 🏠

Applies to: Wx Agency

Weatherization agency expenses related to Program Support and Administration are required to be invoiced monthly using the monthly HE+ Program Services invoice section in the HE+ System.

These expenses are not to be included with the individual HE+ Program Services job expenses. Actual expenses for Program Support and Administrative costs related to HE+ Program Services are required to be invoiced by the 15th of every month. The HE+ System will allow for a 13th month invoice as a [true-up](#) invoice.

Weatherization agencies are required to track HE+ Program Services expenses so an accurate reconciliation or true-up can take place.

NOTE: An Informational Transmittal is issued with the date the first monthly HE+ Program Services invoices are due.

8.2 Tracking Expenses and Reimbursement 🏠

Applies to: Wx Agency

Each agency is required to develop internal controls to address the concern of accidental double-billing of Weatherization jobs that have heating and/or water heater work paid with HE+ Program Services funds or when HE+ Program Services activity is combined with Wx-REF activity. The following are a few examples to consider:

1. When an [energy audit](#) or pre-audit is performed during the same trip as an HE+ Program Services assessment or inspection, direct costs for the trip (time and transportation), the expenses associated with the system assessment/inspection and the weatherization audit is required to be tracked separately and accurately charged to each program (Weatherization or HE+ Program Services).
2. In the case of a Wx-REF where the HVAC and/or water heater work is occurring as part of a weatherization job and the auditing time and inspection time would occur regardless of whether system work was performed, expenses would be allocated to the Weatherization program.
3. When a weatherization job is deferred but has a HVAC and/or water heater safety issue that should be addressed, in this case it is likely all audit time would be charged to Weatherization because the audit was performed for the purpose of weatherizing.

NOTE: At the point where it is determined that it will not proceed as a weatherization job (deferred) and HE+ Program Services funds will be used to address the HVAC and/or water heater (it is now a Wx-REF), all time and costs related to the system replacement/repair would now be allocated to HE+ Program Services.



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

REMINDER: HE+ Program Services reimbursement for funds is not a source of discretionary funding. Any overage accrued by the agency is required to be returned. Agencies are responsible for accurately tracking HE+ Program Services expenses.

8.3 Allowable Costs

Applies to: Wx Agency

Allowable expenses attributable to HE+ Program Services may include Program Support and Administrative costs such as direct (or indirect) staff time, office space, office supplies, utilities, tools, etc. Guidance on how to account for administrative costs is provided below.

Direct charges (staff time, transportation-related, etc.) related to the heating, cooling, and/or water heater assessment is required to be invoiced and included as part of the total cost of replacement/repair and is required to be documented by timesheets that accurately report the hours spent on HE+ Program Services activities.

If the system assessment does not result in a repair or replacement, the labor or trip charge will be categorized as an “assessment only” and should be invoiced in the customer’s HE+ Program Services application as such. Any Administration or Program Support charge related to the “assessment only” is required to be invoiced on the monthly (not per job) HE+ Program Services invoice.

8.4 Administration Expenses

Applies to: Wx Agency

HE+ Program Services Administrative expenses including (as applicable) HE+ System data entry, direct or indirect charged staff costs, office space, supplies, telephone, postage, and other shared expenses are considered allowable program costs. The agency is required to review all Administrative costs related to HE+ Program Services to ensure the agency is accurately recovering allowable costs.

Administrative expenses must not exceed 10% of your agency’s “Total HVAC/Water” expenses for repair, replacement, and assessments plus “Total Program Support” costs for HE+ Program Services.

Formula: (Total HVAC or Water expenses for repair, replacement, and assessment + Total Program Support) * 10% = maximum Administrative expenses allowed

“Total HVAC or Water” and “Total Program Support” data can be found in the HE+ System under “Reports” | “Program Service” | “Fiscal” | “Program Service Expenditure.”

The Program Service Expenditure report must be monitored by the grantee on a monthly basis to ensure compliance with policy.

NOTE: Agencies are required to upload the corresponding monthly General Ledger as supportive documentation to the HE+ System when a monthly invoice contains Program Support Costs that



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

exceed 15% or Administration Expenses that exceed 10%. Agencies must upload the documentation into the HE+ System prior to approving an invoice.

Guidelines for recovering administrative expenses are as follows:

1. Personnel expenses (including salaries, applicable taxes, and benefits) may be charged directly to HE+ Program Services or treated as indirect expenses and allocated to HE+ Program Services, using a reasonable and consistent cost allocation plan. Either method is appropriate, but the agency is required to elect to use only one method (not both) and once elected the method is required to be used consistently.
 - a. If personnel expenses are charged directly to HE+ Program Services:
 - i. Administrative personnel are required to keep daily time records that include the hours charged to all programs on which time was spent.
 - ii. Personnel expenses charged to HE+ Program Services is required to be adequately documented.
 - iii. Agencies are required to ensure that an audit trail exists from the general ledger entry for personnel expenses each pay period to support daily time records.
 - b. If personnel expenses are treated as indirect costs and allocated to HE+ Program Services:
 - i. The agency is required to have procedures in place to ensure that HE+ Program Services is not charged more than its fair share of indirect expenses.
 - ii. The procedures are required to be documented in the agency's written and approved cost allocation plan. Allowable methods for allocating indirect expenses are described below.
2. Indirect expenses, including the cost of administrative staff if treated as an item of indirect cost, may be recovered using one of the following methods:
 - a. Agencies that use an allocation base other than direct labor hours or direct labor expense to allocate indirect costs to programs may use this base to allocate indirect expenses to HE+ Program Services, provided that it represents fairly the effort required to administer the program and is in compliance with [2 CFR 200](#).
 - b. Agencies that use their own crews to repair and replace HVAC and/or water conservation systems and use direct labor hours or direct labor expense as an allocation base may use this method to allocate indirect expenses, including the cost of administrative staff, to HE+ Program Services.
 - c. Agencies that subcontract HE+ Program Services repair and replacement work and use direct labor hours or direct labor expense as an allocation base may find this an unsuitable method to allocate indirect expenses to HE+ Program Services. In that case, agencies may use a two-step allocation method, as follows:

Step 1: Allocate all indirect expenses to a temporary cost center that includes both the Weatherization program and HE+ Program Services, using direct labor hours or direct labor expense as an allocation base.

Step 2: Allocate all indirect expenses from the temporary cost center to HE+ Program Services and Weatherization program based on each program's share of



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

total program expenses, including direct labor, materials, and subcontractor expense.

8.5 Program Support Costs

Applies to: Wx Agency

Expenses and direct charges (staff time, etc.) for HE+ Program Services final inspections for HVAC system and water heater replacements must be billed as a Program Support cost.

Program Support labor includes costs for staff directly managing HE+ Program Services activities and program staff. Agencies must not include administrative, human resources, finance, and clerical staff costs without prior written approval from the Division.

Program Support expenses must not exceed 15% of your agency's "Total HVAC/Total Water" expenses for repairs, replacements, and assessments.

Formula: Total HVAC or Water expenses for repairs, replacements, and assessments * 15% = maximum Program Support expenses

"Total HVAC or Water" data can be found in the HE+ System under "Reports" | "Program Service" | "Fiscal" | "Program Service Expenditure."

The Program Service Expenditure report is required to be monitored by the grantee on a monthly basis to ensure compliance with policy.

NOTE: Agencies are required to 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.

The Division allows Program Support expenses such as:

1. Vehicle maintenance including but not limited to:
 - a. Oil
 - b. License and taxes
 - c. Tires and vehicle repairs
 - d. Vehicle insurance (collision and liability)
 - e. Vehicle lease (and lease termination), and/or purchase as applicable
 - f. Vehicle storage costs
2. Tools and equipment.
 - a. Costs related to tools and equipment may be recovered in one of two ways:
 - i. These costs may be charged directly to HE+ Program Services. In this case, the agency is required to have a suitable method of capturing tools, and equipment costs. Agencies may also have procedures for reporting tools and equipment used on jobs. In these cases, the rates used to recover vehicle,



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

tools, and equipment costs must be reviewed periodically for accuracy and appropriately documented.

- ii. In some cases, agency personnel may combine HE+ Program Services work and weatherization work in a single trip. If this occurs, the agency is required to have procedures in place to allocate transportation, tools, and equipment costs between the two programs. For example, the agency may allocate these costs based on the time the inspector spent on activities related to each program while on the job site.
- 3. Direct supervision of HE+ Program Services staff by the Program Manager and/or Director.
- 4. Direct staff time related to procurement activities for HE+ Program Services including but not limited to:
 - a. Customer contact services.
 - b. Procurement and management of trade contractors.
 - c. Complaints.
- 5. Direct staff time related to inventory.
- 6. Direct staff time related to attending HE+ Program Services specific training.
- 7. Direct staff time related to conducting an HE+ Program Services final inspection for system replacements.

NOTE: Transportation costs associated with Program Services referrals can be billed to each individual job. This includes transportation costs associated with the assessment, repair, replacement, and any collateral work performed for HE+ Program Services. Agencies are required to use the [standard IRS mileage rate](#).

8.5.1 Payment Bonds

Applies to: Wx Agency

Payment bonds are required for all Weatherization and HE+ Program Services contracts exceeding \$149,999 annually and where wholesaler or subcontractor partnerships are utilized to deliver services ([2 CFR 200.325](#); [PRO-C-19](#)). Each payment bond is required to apply to a single contract. The Division may grant a waiver to the payment bond requirement if a potential bidder provides proof of a contractor bond for work performed in the State of Wisconsin. The weatherization agency is required to submit a waiver request to the HE+ Help Desk and include all proof of bonding documentation.

Weatherization agencies, at their discretion, may require payment bonds for all Weatherization and HE+ Program Services contracts up to \$149,999. Program funds may be used to reimburse a contractor for payment bond premium costs as described below. If the weatherization agency chooses not to require a bond for contracts up to \$149,999, the agency is required to complete Weatherization contract Attachment 1 prior to entering into an agreement with the contractor.

The bonding or insurance company issuing the payment bond is required to be authorized to do business in Wisconsin ([PRO-C-19](#)). Agencies are required to verify company status using the [National Association of Insurance Commissioners Search](#) or the [U.S. Department of Treasury Listing of Certified Companies](#). For additional guidance see the Insurance Company Verification



Search and National Association of Surety Bond Producers (NASBP) documents on the [HE+ TTA website](#) under Weatherization | Procurement. Payment bond premium costs may be reimbursed and invoiced to Program Support or Operations. Agencies, at their discretion, will determine how to reimburse the premium cost. The invoicing method must be determined prior to publishing the bid package and the request for bid (RFB) template is required to be updated accordingly.

The use of bid or performance bonds is not allowed. An exception to this requirement may be provided if an agency submits written justification and receives written Division approval prior to finalizing the contract agreement.

8.6 Vendor and Contract Payments

Applies to: Wx Agency

Agencies are required to make timely payments to vendors and contractors as follows:

1. There must be work orders/purchase orders authorizing work to proceed. Variances from the original cost sheet must be documented.
2. The agency is required to normally pay properly submitted vendor invoices within thirty (30) days of receipt, provided goods and/or services have been delivered, installed (if required), and accepted as specified. Variances from the original work order/purchase order must be documented.
3. A good faith dispute, or an improper invoice, creates an exception to prompt payment only when the vendor is notified in writing of the reason for the dispute or improper invoice.
 - a. After a dispute is settled, or an improper invoice is resolved, the agency will have 30 days to pay the invoice.



Appendix A | Definitions

Air-Conditioning, Heating, and Refrigeration Institute (AHRI)

A trade association that develops standards for measuring and certifying the performance of heating, ventilation, air conditioning, commercial refrigeration, and water heating equipment. <https://www.ahridirectory.org/>

appliance

Any device powered by electricity or fuel designed for household use. For HE+ Program Services this includes heating systems, cooling systems, and water heaters.

backdrafting

A dangerous situation where toxic combustion gases are not properly vented. Instead of rising up through a chimney and releasing outside, some exhaust gas enters the home. Backdrafting is primarily a concern with atmospheric venting gas water heaters. *See also urgent safety concern.*

confidential information

Sensitive data is 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.

contractor

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.

denial of service

A refusal of HE+ Program Services due to an ineligible dwelling or other policy-related issues. If the situation is resolved at a later date, and the customer is still eligible for HE+ Program Services, a new referral may be generated by the WHEAP agency.

digital signature

A cryptographic method to verify the authenticity and integrity of digital messages and documents, ensuring they originated from the claimed sender and haven't been altered.

disability

A self-declared physical or mental impairment or a designation made by a state or federal program that:

- Substantially limits one or more of a person's major life activities; or
- Results in the person receiving either Veterans or Social Security disability benefits.

Division



HVAC-A/C



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

The State of Wisconsin, Department of Administration, Division of Energy, Housing and Community Resources (DEHCR).

domestic well

A groundwater well used to supply water for the domestic needs of an individual residence or a water system that is not a public water system and that has no more than four service connections.

elderly household member

Individuals who are 60 years old or older as of the application date.

Emergency HE+ HVAC Heating Program Services referral

Heating system referral made by a WHEAP agency to a weatherization agency during the heating season (October 1 through May 15) due to an inoperable heating system or a heating system that poses a safety risk to an applicant household.

energy audit

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.

ENERGY STAR®

When stated in this manual that a product must meet ENERGY STAR® standards, it must 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.

HE+ Program Services final inspection

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 or a member of the household aged 18 or older must be present to sign the replacement checklist.

fuel type

The five most common fuel types that supply heat to homes in Wisconsin are: natural gas, propane (LP), fuel oil, electricity, and wood (not pictured). Use the following guide to assist in verifying household fuel type.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

electric

Metal baseboards in the rooms of the home may indicate this fuel type. Other fuel sources may sometimes use baseboard systems to distribute heat.

**natural gas**

A gray or white meter on the outside of the home or in the basement may indicate this fuel type.

**oil**

A large tank located in the basement or outside near the home may indicate this fuel type.

**propane**

A large, oblong cylindrical fuel tank located outside and away from the home may indicate this fuel type.

**heating season**

Time period during the program year from October 1 through May 15 that indicates when Regular WHEAP Benefits are issued and when applicants are most likely to use home heating systems.

HVAC system assessment

A visual inspection (with testing as needed) of an HVAC system in response to an HE+ HVAC Program Services referral to evaluate the need for repair or replacement of the system. The assessment must consider the functionality and condition of the heating and cooling systems.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

HVAC system types

Several types of systems supply heating and cooling to homes in Wisconsin. Below are examples of common types.

air source heat pump

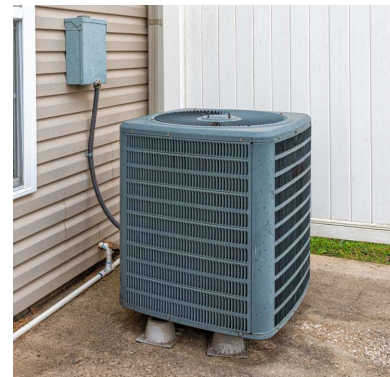
An air source heat pump (ASHP) is a device that moves heat from outside a building to inside, or vice versa, using a refrigerant system. ASHPs are an energy-efficient alternative to furnaces and air conditioners and can be installed in most climate zones.

NOTE: Prior approval from the HE+ Help Desk is required before repairing or replacing an air source heat pump.



central air conditioning

Central air conditioning is a system that cools air in a central location and distributes it to multiple rooms in a home or building using fans and ductwork.



hot water boiler

This heating system uses a circulating pump to distribute hot water to each room through baseboard heaters, radiators, or in-floor radiant tubing in a cement or wood floor. Common fuels are natural gas, propane, and oil. Other fuel sources may include wood.



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

room/space heater

This is a heating system without ducting used to heat a room or small home. A fan may or may not be present for distributing the warm air to a larger area. Common fuels are natural gas, propane, oil, or electricity. Gas and oil space heaters must be located where the exhaust can be vented through an outside wall or through the roof.



steam boiler

This heating system looks similar to a hot water boiler, but uses steam distributed to each room through baseboard heaters or radiators. Steam creates its own pressure to move through the radiators without the use of a pump. As the steam passes through a radiator, it cools and condenses back to water. Gravity returns the water to the boiler to repeat the cycle. Common fuels are natural gas, propane, and oil.



wall furnace

This heating system provides warm air without the use of ducting or pipes for distributing the heat. A wall furnace may or may not have a fan to blow the warm air to a larger area. Wall furnaces mount to a wall, and the vent (chimney) comes off the top or out the back to the outdoors. These units may heat a portion or all of a home or be used as a back-up heat source. Common fuels are natural gas and propane.



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

warm air (forced-air furnace)

This heating system uses a blower to circulate warm air through ductwork and registers to each room. A forced-air furnace can heat with natural gas, propane (LP), oil, electricity, wood, or coal. Mobile or manufactured homes commonly have warm air furnaces. Furnaces can also provide central air conditioning with an a-coil inside the ductwork and a compressor outside.



NOTE: Portable, stand-alone space heaters and/or unvented space heaters are not eligible for repair or replacement through HE+ Program Services.

Other types of heating systems:

Heating systems not defined above should be classified as “Other” in the HE+ System. This may include:

- Commercial grade rooftop unit
- Electric baseboard/radiant wall/ceiling panels
- Fireplace insert, wood or gas fireplace
- Geothermal ground source heat pump*
- Water-source heat pump
- Wood pellet stove**
- Wood stove**

**NOTE: Prior approval from the Division is required before installing geothermal ground source heat pumps.*

***NOTE: Prior approval from the Division is required before installing any wood-burning heating systems. The measure can only be activated by Division staff. Contact the HE+ Help Desk for approval prior to beginning any work.*

ineligible dwelling

Ineligible dwellings (or ineligible buildings or structures) include but are not limited to:

- Secondary home (e.g., vacation home, seasonal home, Airbnb)
- Shelters not designed for use for year-round human habitation
- Multi-unit building with 5 or more units
- Mobile shelters such as recreational vehicles (RVs), tents, campers, and vehicles
- Assisted living facility or nursing home



- Group home, halfway house, Community-Based Residential Facility, or foster home
- Government or institutional facility (e.g., jail, hospital, care institution)
- Rooming house, motel, hotel, YMCA, or YWCA
- Adult Family Home (as licensed by the Wisconsin Department of Health Services)
- Transitional housing facilities
- Deer stand or tent
- Abandoned building or space

REMINDER: Structures originally designed and built for a use other than residential (e.g., manufacturing, commercial, worship) and have been either converted to residential or are being used as a residential building will be reviewed on a case-by-case basis. The weatherization agency is required to receive approval from the HE+ Help Desk prior to proceeding with HE+ Program Services.

Informational Transmittal (IT)

Formal communications provided by the Division to the network via email regarding policy or requesting information. ITs are uploaded to the [HE+ TTA website](#) for future reference. The program year is included in the numbering sequence.

manual referral

An HE+ Program Services referral that is not sent through the HE+ System. This occurs if the HE+ System is down for any reason and a system-generated referral is not possible. Manual referral forms are located on the [HE+ TTA website](#) under HE+ Program Services | Forms.

measures

A generic term used to describe all of the HE+ Program Services items to be addressed (repaired, replaced, or installed) in a dwelling unit.

mobile or manufactured home

These homes are often called a trailer or trailer house. Mobile and manufactured homes are built on a permanently attached chassis. These homes are regulated by the U.S. Department of Housing and Urban Development (HUD) and are often referred to as a HUD code home. Mobile or manufactured homes are often located in mobile home parks but may also be located on private property.

Non-Emergency HE+ HVAC Heating Program Services referral

Heating system referral made by a WHEAP agency to a weatherization agency during the non-heating season (May 16 through September 30) due to an inoperable heating system or a heating system that poses a safety risk to an applicant household.

non-heating season

Time period during the program year from May 16 and September 30 when applicants are less likely to use home heating systems.



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

payment bond

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 non-payment.

partial invoicing

When there is a delay in completing a portion of the job measures, partial invoicing is allowed in order to invoice a portion of the job for timely payment. Emergency HE+ Heating Program Services referral measures related to no heat situations must be completed within response requirements. When partial invoicing, the agency is required to use the date the final measure has been invoiced and add detailed HE+ System Notes.

Profile Management Administrator

The Profile Management Administrator (PMA) is responsible for creating, maintaining, and appropriately deactivating HE+ System/WisWAP user profiles and permissions within their agency.

primary fuel switch

The process of changing a customer's primary fuel to natural gas when a natural gas main is extended to new territory and/or a new lateral is installed from the main to a building.

primary heating system

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.

probate

a court-supervised legal process to validate a deceased person's will (if one exists), pay their final debts and taxes, and distribute their remaining assets to their heirs or beneficiaries.

program year

Home Energy Plus Program fiscal years:

- WHEAP: Program year begins October 1 and ends September 30.
- Weatherization: Program year begins July 1 and ends June 30.

Public Benefits utilities

Wisconsin utilities who participate in the Wisconsin Public Benefits program. The Public Benefits (PB) program is funded by fees collected by electric utilities and provides benefits for non-heating electric use. It operates an income-eligible fund into which participating electric providers in the state contribute an amount primarily generated by a fee added to customers' electric bills. The money in this fund is divided between the Wisconsin Home Energy Assistance Program and the Weatherization Assistance Program.



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Quality Control System (QCS)

Procedures that are designed to provide a detailed review of the weatherization program process including an on-site unit check and measurement of customer satisfaction. The QCS process is not the same as an HE+ Program Services final inspection completed on each HVAC and water heater replacement job. Agencies are required to have a mechanism to track jobs receiving a QCS review and are required to document management review and approval. Several optional checklists for review and documentation are available on the [HE+ TTA website](#) under Weatherization | Resources.

recent tasks

This HE+ System dashboard feature provides alerts to HE+ program staff regarding the status of certain applications and functions related to HE+ Program Services referrals and invoicing.

referral

Once an applicant is determined eligible for Home Energy Plus Program benefits and services, and the appropriate homeownership is determined for HE+ Program Services, a WHEAP agency or weatherization agency will refer the applicant to the appropriate agency (WHEAP or Weatherization) to move forward with providing HE+ Program Services to the applicant.

referral date

The referral date for HE+ Program Services is:

- The date the WHEAP agency requests the weatherization agency proceed with providing service to an eligible applicant for HE+ Program Services, or
- The date the weatherization agency requests the WHEAP agency proceed with determining eligibility of an applicant for a Wx-REF.

request date

The request date for HE+ Program Services is the date the WHEAP agency receives the request from the eligible applicant for HE+ Program Services. For a Weatherization referral (Wx-REF), the request date is the date of referral.

service date

The date the weatherization agency or their subcontractor repairs or replaces the HVAC or water system. When partial invoicing, the agency is required to use the date the final measure has been invoiced and add detailed HE+ System Notes.

tiny homes

Tiny homes are defined as any home that falls under a maximum of 500 square feet. They can be built on either a mobile platform or a permanent house foundation.

Training and Technical Assistance (T&TA)

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.



troubleshooting

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.

true-up

The annual financial process to close out grants at the end of the contract. The Division issues guidance to subgrantees via an Informational Transmittal.

unvented space heaters

Unvented space heaters present an urgent safety concern for household occupants. When a weatherization agency or its subcontractor finds an unvented space heater in a home, the customer must immediately be encouraged to have the unit removed or disabled. The weatherization agency is required to follow up with an agency-generated letter to the customer notifying them of the hazards and risks involved with using an unvented space heater. A copy of the letter is required to be uploaded into the HE+ System.

urgent safety concern

*In determining whether the situation is an urgent safety concern, the following guidelines apply.

Service Type	Guidelines
No Heat (HVAC)**	The worker is required to 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). **Emergency timelines apply during heating season.
Water Conservation	The worker must consider if there are signs of elevated carbon monoxide levels in the home. See also backdrafting.

Water Conservation Program assessment

Water heater assessment (with testing as needed) to evaluate the need for repair or replacement of the system. The assessment must consider the functionality and condition of the system.

water heater types

Several types of systems supply hot water to homes in Wisconsin. Following are examples of common types.



electric water heater

Electric water heaters work by bringing cold water into the tank, heating it with the immersion heating elements, and then moving the hot water from the top of the unit throughout the home using home plumbing. Electric water heaters run on electricity and must be completely wired.



natural gas or LP water heater – natural draft

This type of water heater is called a “natural draft” water heater because it removes the exhaust gases without assistance by a fan. The buoyancy of the hot gases causes them to rise. The flue channels them to an exterior vent up and away from the living space. While these heaters use gas to heat the water, they require electricity to power the hardware for the process. A power outage will result in the heater not working during the outage.



natural gas or LP water heater – power vent

A power vent water heater is vented horizontally and vents exhaust through a horizontal pipe that leads out of the home. An added fan/blower pushes the exhaust gases through this pipe. Extra power is required to power the blower, and this power source is separate from powering your water heater.



fuel oil water heater – natural draft

An oil hot water heater, also known as an oil-fired water heater uses oil to generate heat instead of electricity or gas. Oil water heaters are the least common water heater for residential homes. Oil hot water heaters have a draft regulator in the exhaust piping. Draft regulators or barometric dampers are devices used to regulate the draft on oil-fired furnaces, boilers, and water heaters.



weatherization

The improvement of a dwelling unit to reduce energy consumption. It often includes the installation of insulation and replacement or modification of the heating system.

Weatherization referral (Wx-REF)

HE+ Program Services referral originated by the weatherization agency when:

1. The home is currently undergoing weatherization services and needs HVAC system or water heater services, but the service cannot occur as a part of the weatherization of the dwelling,
2. The home has been deferred for weatherization services and has an HVAC or water heater issue that needs to be addressed, and/or



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



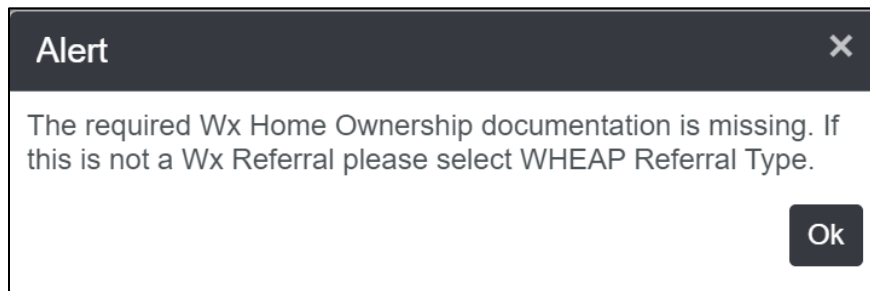
WHEAP Agency



Wx Agency

3. The home has been previously weatherized and natural gas is now available or will be available due to utility gas expansion.

NOTE: In order for the WHEAP worker to generate a Wx-REF, the weatherization agency must have created a building in the HE+ System and already uploaded the home ownership verification. If the WHEAP worker receives an alert that the required Wx Home Ownership documentation is missing when generating a Wx-REF, the worker is required to contact the weatherization agency to confirm whether the request is a true weatherization referral. If it is not a Wx-REF, the WHEAP worker must enter it as a WHEAP referral instead.



WHEAP referral

A WHEAP referral is originated by the WHEAP worker. Typically, a customer will contact the WHEAP agency with a request for assistance and the WHEAP worker will begin the referral process.

Appendix B | HE+ Program Services HVAC Air Control Eligibility Program Year 2026 Flow Chart – Text Equivalent

WHEAP Team: In order to service central air conditioners*, the customer's primary heating system must also be inoperable or unsafe. Ask the following two questions to determine whether an HVAC referral for the customer is allowed.

Applies to: WHEAP Agency

Step 1: Customer must be a WHEAP eligible homeowner in the current program year.

Step 2: Ask the following questions.

- Does the customer have an unsafe or inoperable heating system in their home?
 - If yes, proceed to the next question.
 - If no, deny referral.
- Does the customer have inoperable or unsafe central air conditioning in their home?
 - Regardless of the answer, create an HVAC referral**.

Wx Team: To determine what HVAC services the customer is eligible for ("Heating" or "Heating and Air Control"), see below.

Applies to: Wx Agency

Step 1: There must be an HVAC referral generated from the WHEAP agency.

Step 2: Ask the following questions.

- Does the customer have an unsafe or inoperable heating system in their home?
 - If yes, proceed to the next question.
 - If no, deny services.
- Is there an inoperable or unsafe central air conditioning system in the home? Or, does the condition of the central air conditioning unit impact the operation of the heating system?
 - If yes, proceed with heat and A/C**.
 - If no, proceed with heat only**.

**We do not work on window or portable air conditioning units.*

***All other HE+ Program Services eligibility requirements must also be met*



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Appendix C | Customer Education

The Carbon Monoxide, Preventing Frozen Pipes, and Water Heater Troubleshooting informational sheets can also be found on the [HE+ TTA website](#) under HE+ Program Services | Resources. Text equivalent for each information sheet can be found after each graphic.

CARBON MONOXIDE (CO)

What you need to know to stay safe

CARBON MONOXIDE ALARM LOCATIONS—Install CO alarms on each floor and in the vicinity of sleeping areas according to the manufacturer's instructions.

WHAT IS CARBON MONOXIDE (CO)?
CO is a colorless, odorless, **toxic** gas formed by incomplete combustion of gas, oil, wood, and other fuels.

HOW CO EXPOSURE CAN AFFECT YOU
Headaches • Memory loss • Severe muscle pain • Dizziness • Nausea • Fatigue • Persistent cough • Difficulty breathing or breathlessness

The effect of CO poisoning is dependent on the exposure time and the concentration level in the air. CO effects will vary depending on the overall health, age, sex, and weight of an individual. The young, elderly, and those with medical conditions are at higher risk.

WHAT TO DO IF YOUR ALARM SOUNDS
If anyone in the household is feeling ill, immediately evacuate the building and contact emergency services. If no one is feeling ill, turn off fuel burning appliances or equipment, air out your home by opening doors and windows, and contact your local utility or qualified contractor to determine the source of the CO.

***Note**—if your alarm chirps, the battery is low and needs to be replaced. A CO alarm emitting a beep every 30 seconds or displaying ERR or END requires replacement.*

COMMON SOURCES OF CARBON MONOXIDE

1 Furnace	4 Fuel-fired fireplace
2 Water heater	5 Stove
3 Dryer	

Malfunctioning and improperly installed gas, oil, or wood-burning appliances and fireplaces can produce CO.

Have all fuel burning appliances and related venting/chimneys inspected annually by a qualified contractor.

6 Blocked vents/Chimney
Improperly installed vent connectors and blocked flues or chimneys can allow CO to backdraft into your home.

7 Car
High levels of CO (up to 500 ppm in two minutes) are produced when you warm up your car in an attached garage.

8 BBQ/Grill
Never use a BBQ or grill (especially charcoal-fired units) in an enclosed space (your house or garage) to prevent exposure to high levels of CO and reduce risk of fire.

Carbon Monoxide (CO): What you need to know to stay safe

Carbon Monoxide Alarm Locations – Install CO alarms on each floor and in the vicinity of sleeping areas according to the manufacturer's instructions.



What is Carbon Monoxide (CO)?

CO is a colorless, odorless, toxic gas formed by incomplete combustion of gas, oil, wood, and other fuels.

How CO Exposure Can Affect You

- Headaches
- Memory loss
- Severe muscle pain
- Dizziness
- Nausea
- Fatigue
- Persistent cough
- Difficulty breathing or breathlessness

The effect of CO poisoning is dependent on the exposure time and the concentration level in the air. CO effects will vary depending on the overall health, age, sex, and weight of an individual. The young, elderly, and those with medical conditions are at higher risk.

What to do if Your Alarm Sounds

If anyone in the household is feeling ill, immediately evacuate the building and contact emergency services. If no one is feeling ill, turn off fuel burning appliances or equipment, air out your home by opening doors and windows, and contact your local utility or qualified contractor to determine the source of the CO.

Note – if your alarm chirps, the battery is low and needs to be replaced. A CO alarm emitting a beep every 30 seconds or displaying ERR or END requires replacement.

Common Sources of Carbon Monoxide

Furnace, water heater, dryer, fuel-fired fireplace, stove

Malfunctioning and improperly installed gas, oil, or wood-burning appliances and fireplaces can produce CO. Have all fuel burning appliances and related venting/chimneys inspected annually by a qualified contractor.

Blocked vents/Chimney

Improperly installed vent connectors and blocked flues or chimneys can allow CO to backdraft into your home.

Car

High levels of CO (up to 500 ppm in two minutes) are produced when you warm up your car in an attached garage.

BBQ/Grill

Never use a BBQ or grill (especially charcoal-fired units) in an enclosed space (your house or garage) to prevent exposure to high levels of CO and reduce risk of fire.



HVAC-Air



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Preventing **FROZEN PIPES** this Winter

When temperatures drop, water pipes in your home can freeze and potentially burst causing costly water damage and disruption. Below are a few essential tips on how to prevent frozen pipes, recognize warning signs, and safely handle situations if pipes do freeze.



Vulnerable Pipes

- Pipes in unheated areas (basements, crawl spaces, attics, garages).
- Pipes along exterior walls with little insulation.
- Exposed boiler pipes.
- Outdoor faucets.



During Cold Weather

- Open kitchen and bathroom cabinets to allow warm air to circulate (move all chemicals out of reach).
- Let cold water drip or trickle from faucets on the exterior walls of your home.
- Maintain a consistent thermostat setting, even at night.
- If away, keep heat at 55°F or higher.
- Keep garage doors closed if pipes run through the garage.



Before Freezing Temperatures

- Know the location of your water shut off valves.
- Disconnect, drain, and store outdoor hoses. Shut off indoor valves to hose bibs and leave exterior valves open.
- Insulate unheated areas and exposed pipes using pipe sleeves or other insulation. For pipes with high potential for freezing, consider using heat tape.
- Seal cracks or gaps where cold air can access your home around or near water pipes.
- If you live in a mobile home, seal any skirting or underbelly holes.
- Schedule routine boiler maintenance to prevent potential issues.



If you suspect frozen pipes

- Turn off water at shut off valves.
- Apply heat gradually to area where pipe is frozen using a hair dryer, heating pad, space heater, or warm water. (Note: do not leave space heaters unattended or use open flames to thaw pipes)
- **Call a plumber:** If you cannot locate or access the frozen pipe, or if the problem persists, contact a professional plumber.

Data adapted from: <https://www.redcross.org/get-help/how-to-prepare-for-emergencies/types-of-emergencies/winter-storm/frozen-pipes.html>

homeenergy+



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Preventing Frozen Pipes this Winter

When temperatures drop, water pipes in your home can freeze and potentially burst causing costly water damage and disruption. Below are a few essential tips on how to prevent frozen pipes, recognize warning signs, and safely handle situations if pipes do freeze.

Vulnerable Pipes

- Pipes in unheated areas (basements, crawl spaces, attics, garages).
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- Exposed boiler pipes.
- Outdoor faucets.

During Cold Weather

- Open kitchen and bathroom cabinets to allow warm air to circulate (move all chemicals out of reach).
- Let cold water drip or trickle from faucets on the exterior walls of your home.
- Maintain a consistent thermostat setting, even at night.
- If away, keep heat at 55°F or higher.
- Keep garage doors closed if pipes run through the garage.

Before Freezing Temperatures

- Know the location of your water shut off valves.
- Disconnect, drain, and store outdoor hoses. Shut off indoor valves to hose bibs and leave exterior valves open.
- Insulate unheated areas and exposed pipes using pipe sleeves or other insulation. For pipes with high potential for freezing, consider using heat tape.
- Seal cracks or gaps where cold air can access your home around or near water pipes.
- If you live in a mobile home, seal any skirting or underbelly holes.
- Schedule routine boiler maintenance to prevent potential issues.

If you suspect frozen pipes:

- Turn off water at shut off valves.
- Apply heat gradually to area where pipe is frozen using a hair dryer, heating pad, space heater, or warm water. (Note: do not leave space heaters unattended or use open flames to thaw pipes)
- **Call a plumber:** If you cannot locate or access the frozen pipe, or if the problem persists, contact a professional plumber.



HVAC-AII



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Water Heater Referral Troubleshooting and Water Heater Types			
Water Heater Types			
GAS POWER VENTED WATER HEATER	GAS NATURAL DRAFT WATER HEATER	MOBILE HOME DIRECT VENT WATER HEATER	ELECTRIC WATER HEATER
- Vent fan on top blows exhaust out of the home. - The fan is plugged into an outlet. - The vent pipe is white PVC. 	- The vent pipe is metal. - There is an air gap between the water heater and the vent bell hood. 	- The vent pipe is metal. - The vent connects directly to the water heater with no air gap. 	- Unit does not have a vent. - Home electric service panel is power source. - Two heating elements. If one element quits working, the water will be warm, not hot. 
Troubleshooting Questions - When was the water heater last working? - Was there a power outage or power surge from a weather event? A power surge can trip the breaker or GFCI receptacle. The pilot light may have blown out due to high winds. - If the water heater or water heater vent fan is plugged into a receptacle, the customer should check the receptacle to verify it has power. This can be done by plugging something else into that receptacle to verify power. Sometimes, a flip of a breaker or push of a button on the GFCI receptacle will fix the problem. - Is the exhaust pipe covered by snow or blocked by anything? The water heater will not work if the vent pipe is plugged. - Is the water heater gas, electric or fuel oil? Electric Water Heater: Flip the breaker in the electrical service panel for the water heater off then on again to reset the unit. Gas Water Heater: Are there other gas appliances in the home (possibly the furnace or oven) if so, are they working? Fuel Oil Water Heater: Is the tank empty? Notes: Always make a note in the referral email detailing the customer's issues. For example: - The water heater is working but leaks. Customer turns it on to use and then shuts it off again. - Water heater does not work. Client is elderly and disabled, has been without hot water for 2 weeks.			

Document courtesy of North Central Community Action Program

Water Heater Referral Troubleshooting and Water Heater Types

Gas Power Vented Water Heater

- Vent fan on top blows exhaust out of the home.
- The fan is plugged into an outlet.
- The vent pipe is white PVC.

Gas Natural Draft Water Heater

- The vent pipe is metal.
- There is an air gap between the water heater and the vent bell hood.

Mobile Home Direct Vent Water Heater

- The vent pipe is metal.
- The vent connects directly to the water heater with no air gap.

Electric Water Heater

- Unit does not have a vent.
- Home electric service panel is power source.
- Two heating elements. If one element quits working, the water will be warm, not hot.



HVAC-A/H



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

Troubleshooting Questions

- When was the water heater last working?
- Was there a power outage or power surge from a weather event? A power surge can trip the breaker or GFCI receptacle. The pilot light may have blown out due to high winds.
- If the water heater or water heater vent fan is plugged into a receptacle, the customer should check the receptacle to verify it has power. This can be done by plugging something else into that receptacle to verify power. Sometimes, a flip of a breaker or push of a button on the GFCI receptacle will fix the problem.
- Is the exhaust pipe covered by snow or blocked by anything? The water heater will not work if the vent pipe is plugged.
- Is the water heater gas, electric or fuel oil?

Electric Water Heater: Flip the breaker in the electrical service panel for the water heater off then on again to reset the unit.

Gas Water Heater: Are there other gas appliances in the home (possibly the furnace or oven) if so, are they working?

Fuel Oil Water Heater: Is the tank empty?

Notes: Always make a note in the referral email detailing the customer's issues. For example:

- *The water heater is working but leaks. Customer turns it on to use and then shuts it off again.*
- *Water heater does not work. Client is elderly and disabled, has been without hot water for 2 weeks.*

Document courtesy of North Central Community Action Program



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



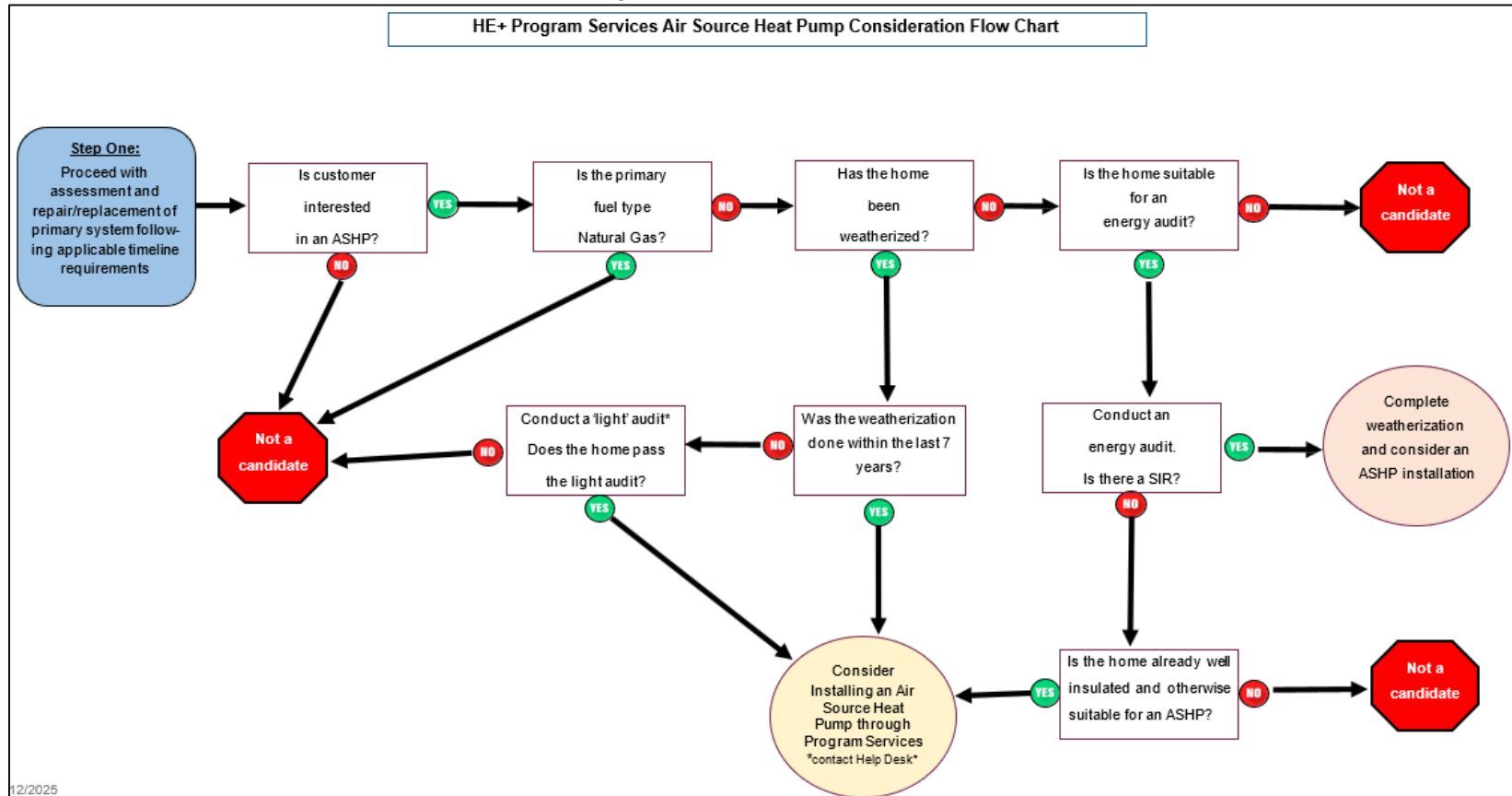
WHEAP Agency



Wx Agency

Appendix D | Air Source Heat Pump (ASHP) Consideration Flow Chart

The ASHP Consideration Flow Chart can also be found on the [HE+ TTA website](#) under HE+ Program Services | Resources. Text equivalent for the flow chart can be found after the graphic.



**NOTE: Prior approval from the HE+ Help Desk is required before repairing or replacing an air source heat pump.*



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

ASHP Consideration Flow Chart – Text Equivalent

Step 1: Proceed with assessment and repair/replacement of primary system following applicable timeline requirements.

Step 2: Is customer interested in an ASHP?

- If yes, proceed to step 3.
- If no, customer is not a candidate.

Step 3: Is the primary fuel type Natural Gas?

- If yes, customer is not a candidate.
- If no, proceed to step 4.

Step 4: Has the home been weatherized?

- If yes, proceed to step 4a.
- If no, proceed to step 4b.

Step 4a: Was the weatherization done within the last 7 years?

- If yes, consider installing an Air Source Heat Pump through Program Services **contact Help Desk**
- If no, conduct a 'light' audit*. Does the home pass the light audit?
 - If yes, consider installing an Air Source Heat Pump through Program Services **contact Help Desk**
 - If no, customer is not a candidate.

Step 4b: Is the home suitable for an energy audit?

- If no, customer is not a candidate.
- If yes, conduct an energy audit. Is there an SIR?
 - If yes, complete weatherization and consider an ASHP installation.
 - If no, determine: is the home already well insulated and otherwise suitable for an ASHP?
 - If yes, consider installing an Air Source Heat Pump through Program Services **contact Help Desk**
 - If no, customer is not a candidate.

**NOTE: Prior approval from the HE+ Help Desk is required before repairing or replacing an air source heat pump.*



Appendix E | Summary of 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 are required to be reviewed in entirety in the PY25 HE+ Program Services Manual. Changes in the manual effective as of October 1, 2025, are highlighted in yellow.

1st Mention	Service	Topic	Revision	Focus
Chapter 1	All	Availability	Chapter 1 Introduction Applies to: WHEAP Agency, Wx Agency Home Energy Plus (HE+) Program Services is a year-round program that provides assistance to eligible Wisconsin residents. Local weatherization agencies are responsible for managing program delivery and invoicing payment of completed work. The Wisconsin Home Energy Assistance Program (WHEAP) agency verifies applicant eligibility and reserves funds when generating an HE+ Program Services referral to the weatherization agency. WHEAP and weatherization agencies work cooperatively to ensure program goals and requirements are met while providing timely delivery of service. All other applicable WHEAP and Weatherization program requirements apply.	WHEAP Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
1.1, #2	HVAC	A/C Policy	2. HE+ HVAC Air Control (A/C) Program Services <i>Applies to: HVAC-A/C</i> HE+ HVAC A/C Program Services offers repair or replacement of central air conditioning systems only in the following circumstances: The customer's primary heating system must be inoperable or unsafe, prompting the customer to call for a referral. Upon assessment of the heating system, it is discovered that the customer's central air conditioning system is also inoperable or unsafe. The condition of the customer's air control system will compromise the performance of the heating system. If the customer is only using portable and/or window air conditioning units or does not have an inoperable central air conditioning system or ASHP, the customer is not eligible to receive HE+ HVAC A/C Program Services. Agencies are required to 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. Customers utilizing a portable and/or window air conditioning unit due to an inoperable central air conditioning unit or ASHP may be referred for HE+ HVAC A/C Program Services for an assessment of the primary cooling unit only if the cooling unit compromises the heating unit.	WHEAP Wx
1.1, #3	Water	Water policy	3. HE+ Water Conservation Program Services <i>Applies to: Water Conservation</i> The HE+ Water Conservation Program provides assistance to eligible Wisconsin households with leaking or non-working water heaters. These measures can include collateral work needed to ensure the unit is installed per manufacturer's instruction and can operate successfully (i.e., floor repairs, shut off valves for other leaks, etc.) NOTE: Additional work must be approved by the HE+ Help Desk prior to starting the job (after the assessment). NOTE: Customers must live in the territory of a participating Public Benefits utility and be eligible for Public Benefits in order to qualify for HE+ Water Conservation Program Services.	WHEAP Wx
1.2	All	Deferrals	There is no entitlement to HE+ Program Services. There may be a denial of service for several different reasons. NOTE: Deferrals of HE+ Program Services are not allowed.	Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
1.2.10	All	Reimbursements	Reimbursement of applicant expenses is not typically allowed when an HE+ Program Services issue is repaired or replaced by the applicant, or a contractor hired by the applicant. Customers may be eligible for reimbursement if: - The customer has a current, eligible WHEAP application and was WHEAP eligible at the time of the repair or replacement and ii. The customer has not received HE+ Program Services in the past. NOTE: If a reimbursement request is received, agencies are required to contact the HE+ Help Desk for review.	WHEAP Wx
1.3	All	Wx-Refs	Weatherization referral: A weatherization referral (Wx-REF) originates from the weatherization agency. A representative from the weatherization agency will contact the WHEAP agency and request a referral to be generated. It is the weatherization agency's responsibility to follow up with the WHEAP agency to ensure the Wx-REF has been generated within 5 business days. 🏠 <i>Applies to: Wx Agency</i> The weatherization agency is responsible for verifying and uploading homeownership for Wx-REFs. 🏠 <i>Applies to: Wx Agency</i>	Wx
2	All	Recent Tasks	Chapter 2 Response Requirements 🧑🏠 WHEAP and weatherization agencies must ensure response timelines are met in accordance with HE+ Program Services policy. Agencies are required to monitor the Recent Tasks on the HE+ System dashboard throughout the business day. HE+ System Notes explaining reasons for the delay must be entered when any response timeline requirement is not met.	WHEAP Wx
2	All	Delay in Service	REMINDER: The weatherization agency is required to alert the HE+ Help Desk if the completion date for any HE+ HVAC Heating Program Services emergency referral is extended beyond seven calendar days. 🏠 <i>Applies to: Wx Agency</i>	Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
2.1.6	All	Delay in Service	Complete services within 72 hours of receiving the referral from the WHEAP agency. In the case of a delayed response (heating system assessment conducted beyond 24-hour deadline, or services completed after 72-hour deadline), the weatherization agency is required to document in HE+ System Notes all of the following: The reason for the delay, Details as to whether the household has access to temporary heat, can be provided temporary heat, or is able to relocate, and if the customer chooses to remain in the home while waiting for services, and Verification of the well-being of the residents and any special needs of the family.	WHEAP Wx
2.1.6	All	Invoice deadline	Invoice the job in the HE+ System within 30 days of the service date.	Wx
2.1.7	All	Completion date	2.1.7 Non-Emergency Referrals – HE+ HVAC Heating Program Services <i>Applies to: Wx Agency, HVAC-Heating</i> During the non-heating season (May 16 - September 30), the weatherization agency is required to: Verify that criteria for HE+ HVAC Heating Program Services are met and assess the heating system condition within 10 business days of the WHEAP referral. Create a Job ID within three business days of the referral receipt. NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes are required to be made explaining the delay. After the job has been assessed, add measures to the job immediately to ensure funding is reserved. Enter initial HE+ System Notes within 10 business days of referral receipt. Complete the job within 30 calendar days of the WHEAP referral date. The job must be invoiced in the HE+ System within 30 calendar days of the service date.	Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
2.1.8	HVAC	Wx Ref-Delay	2.1.8 Weatherization Referrals (Wx-REF) – HE+ HVAC Heating Program Services <i>Applies to: Wx Agency, HVAC-Heating</i> The weatherization agency is required to follow response timelines according to the time of year and urgency of the situation. NOTE: For non-emergency and weatherization referrals, if the heating system repair or replacement is delayed beyond 30 calendar days from the WHEAP referral date, the weatherization agency is required to document the reason for the delay in HE+ Program Services System Notes and alert the HE+ Help Desk. This situation may occur due to a variety of factors related to the cycle for completing heating system work under non-emergency conditions or as part of a weatherization job.	Wx
3.1.2	All	SSN exception	3.1.2 HE+ Program Services Referrals Without Social Security Number (SSN) Verification <i>Applies to: WHEAP Agency</i> Agencies must not make any HE+ Program Services referrals until all SSNs on the HE+ Application have been verified and the HE+ Application is complete. EXCEPTIONS If the social security number in question has been verified by the worker in CARES Worker Web (CWW), the agency may process an HE+ Program Services manual referral via email to the weatherization agency. Infants (newborns) less than 60 days old where an SSN has not yet been issued may be processed without a valid SSN if the applicant has applied for an SSN for the infant. Contact the HE+ Help Desk for approval. NOTE: The agency is required to enter an HE+ System Note indicating the recipient of the manual referral, the date it was sent, and the exception verification used. The agency must also alert the HE+ Help Desk in writing notifying the Division of the manual referral. The worker is required to notify the applicant that they are responsible for repayment if any SSN on the HE+ Application cannot be verified (resulting in the application being incomplete).	WHEAP



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
3.2.1	All	Probate Deceased owner	Homes in probate are ineligible for HE+ Program Services with the possible exception of a recently deceased homeowner. In cases of a recently deceased (within 30 days) household member where the homeownership is in the name of the deceased person, please contact the HE+ Help Desk for a possible waiver.	WHEAP
3.3	All	Rentals	3.3Rental Dwellings   <i>Applies to: WHEAP Agency, Wx Agency</i> Rental situations require prior HE+ Help Desk approval. In most rental situations where the landlord receives rental income from the tenant, the HE+ Program Services request will be denied. For referrals involving ALL landlords, the worker must contact the HE+ Help Desk for approval prior to generating the HE+ Program Services referral for the tenant. This also applies to weatherization agencies when verifying ownership for a Weatherization referral (Wx-REF).	WHEAP Wx
3.4.2	All	Ineligible dwelling	3.4.2 Ineligible Dwellings and Structures   <i>Applies to: WHEAP Agency, Wx Agency</i> Ineligible dwellings include but are not limited to: Dwellings where the system that is being assessed (HVAC heating system, central air conditioning or water heater) had failed prior to the customer's residency in the home,  <i>Applies to: Wx Agency</i> If after the assessment of a failed system the weatherization agency or its subcontractor determines the system has not been in working condition prior to the customer's residency in the home, the weatherization agency is required to receive approval from the HE+ Help Desk prior to proceeding with HE+ Program Services. Buildings that contain a residential and a commercial unit where both the residential and commercial units share a heating system and/or water heater,	WHEAP Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
3.4.3	All	Natural disaster	3.4.3 Dwellings Affected by Natural Disaster <i>Applies to: WHEAP Agency, Wx Agency</i> WHEAP-eligible applicants that have a HVAC system and/or water heater damaged by flood, fire, or other natural disaster needing repair or replacement can be referred for HE+ Program Services. The WHEAP worker is required ask the customer if they have homeowner's insurance. If the customer states they do not have homeowner's insurance, no further documentation is needed and the referral can be generated. If the customer does have homeowner's insurance, the worker is required to contact the HE+ Help Desk prior to creating a referral. HE+ Program Services funds cannot be used to pay customers' insurance deductibles If the customer has homeowner's insurance but cannot afford the deductible, the worker is required to contact the HE+ Help Desk. If the home is deemed uninhabitable, the worker is required to contact the HE+ Help Desk before denying the referral request. NOTE: The WHEAP worker is required to make detailed notes in the HE+ System. <i>Applies to: WHEAP Agency</i>	WHEAP Wx
3.5.4	All	Denial report	3.5.4 Denial of HE+ Program Services <i>Applies to: WHEAP Agency, Wx Agency</i> The "Denied Program Service" report provides a list of Program Services referrals that have been entered by WHEAP and/or Wx agencies that have been subsequently denied and extracted (Denied – Extracted).	WHEAP Wx
3.5.4	All	Denial reasons	The applicant has mistreated and/or altered the operation of the HVAC system or water heater. Regular home maintenance on the HVAC system or water heater has not been completed causing the system issue. Examples include, but are not limited to: - Appropriate HVAC filters not used or changed - Regular bleeding of boiler not completed - The wrong fuel type for the system being used - Water pipes frozen* or broken due to lack of maintenance NOTE: Contact the HE+ Help Desk prior to denying services. *See Appendix C for tips on preventing frozen pipes.	WHEAP Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
3.5.4	All	Customer availability	Two or more documented appointments (or phone calls made to schedule an appointment) by the weatherization grantee or contractor have been missed or not responded to by the customer. 🏠 <i>Applies to: Wx Agency</i> Dates and times of calls and/or appointments made and subsequently missed or not responded to by the customer are required to be added to HE+ System Notes. Customers who indicate they will not be available for an assessment and/or service for two (2) weeks or more shall be denied and instructed to contact their WHEAP agency when they return.	WHEAP Wx
3.5.4	All	For sale or foreclosed	The building is for sale or is in foreclosure proceedings. Homes must be off the market for one year before being eligible for HE+ Program Services. Contact the HE+ Help Desk for guidance on establishing the date of eligibility. NOTE: If the worker is aware that the customer has filed bankruptcy, the worker is required to contact the HE+ Help Desk prior to generating a referral.	WHEAP Wx
3.5.4	All	Delinquent taxes	Online property tax records show the homeowner owes two (2) full years or more in property taxes and does not have a payment plan in place with the county treasurer's office. Agency must confirm payment arrangements with a county official. HE+ System Notes are required. Contact the HE+ Help Desk for approval prior to generating the referral. NOTE: Current property taxes are considered delinquent if payment has not been made by October of the current year.	WHEAP Wx
3.5.4	All	Fuel switch	In the case of a non-emergency fuel switch when the main and/or lateral line has not yet been installed, the job must be denied by the weatherization agency and the customer advised to call their WHEAP agency when the installation is complete to request a new referral.	Wx
3.5.5	All	Rental denials	Make detailed HE+ System Notes stating the reason for the denial, when the customer was contacted about the denial, and what other resources were offered to the customer. NOTE: In situations involving rental denials, the denial letter is required to be mailed to both the landlord and the tenant. HE+ System Notes are required under both the landlord and the tenant's PID.	WHEAP Wx
3.5.5	All	Denial notifications	Enter detailed HE+ System Notes explaining the reason(s) for the denial, when the verbal denial was provided, the date the denial letter was mailed to the customer, and any additional customer contacts that occurred.	Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
4.2	All	Subcontractors	The weatherization agency is required to perform HE+ Program Services or may subcontract the work to subcontractor(s) selected by competitive bids. See the current program year Weatherization Assistance Program Manual for details on procurement management. The weatherization agency is required to enter, update, and review their subcontractors in the HE+ System every program year and whenever changes occur. Invoices are required to match the subcontractor's name selected in the HE+ System. Agencies must not select work performed "in-house" if the work was completed by a subcontractor.	Wx
4.2	All	Profile Management Administrator (PMA)	The weatherization agency is responsible for appointing an HE+ System/Program Services "Profile Management Administrator" (PMA) with a written request to the Division via the HE+ Help Desk. The PMA is responsible for: - Creation of new, and maintenance of current, HE+ System/WisWAP contacts/permissions/user profile information (including review of the user profile name for appropriateness upon creation) within their agency. - Maintenance of current HE+ System/WisWAP user profiles includes: i. Inactivate user profiles who will be off the system for more than two weeks on vacation, maternity leave, summer leave, or any other reason. ii. Immediately deactivate user profiles who have been terminated, retired, quit, or otherwise have left the program. Any staff person with a user profile has the responsibility to maintain the confidentiality of their username and password. Usernames and passwords must not be shared with anyone, including other agency staff. The user logged in is responsible for all activity occurring under their user profile. All activity in the system is recorded and time stamped according to the user login.	Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
4.3	All	Contact Information Forms	An HE+ Program Services Contact Information Form is required to 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 forms via an Informational Transmittal prior to the beginning of the program year. <i>Applies to: WHEAP Agency, Wx Agency</i> A qualified agency representative shall complete the entire form by filling in all fields. WHEAP and Weatherization agencies shall complete a separate form for each county/tribe they serve. WHEAP agencies are required to provide the following information: <i>Applies to: WHEAP Agency</i> Primary HE+ Program Services WHEAP contact, Secondary WHEAP contact and, After hours WHEAP contact, Whether the agency offers space heaters to customers and Steps to ensure policy timelines are met outside regular business hours, including weekends and holidays. Weatherization agencies are required to provide the following: <i>Applies to: Wx Agency</i> Primary HE+ Program Services contact, Secondary contact, After hours agency contact, Primary HVAC heating system contractor, Primary HVAC cooling system contractor, Primary water conservation contractor, Whether the agency offers space heaters to customers and, Process by which referrals are communicated to contractors. Any changes or updates to the form must be sent to the HE+ Help Desk within 3 business days.	WHEAP Wx
5.1	All	Mechanical systems measures	All work performed is required to meet all local building codes. Agencies must obtain all municipality required permits as applicable. Materials and appliances must be installed to meet Product Manufacturer Instructions (PMI). Agencies are required to refer to Section 8.7 of the Wisconsin Weatherization Assistance Program Manual for additional guidance on mechanical systems measures.	Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus																																							
Table 5.2	All	Measure cost limits	<table><tr><th colspan="3">HE+ HVAC Heating Program Services Cost Limits</th></tr><tr><th colspan="3">Heating System Assessments</th></tr><tr><th>Measure Code</th><th>Description</th><th>Cost Maximum</th></tr><tr><td>EFAS005</td><td>Heating system Assessment</td><td>\$300</td></tr><tr><th colspan="3">Heating System Repairs</th></tr><tr><th>Measure Code</th><th>Description</th><th>Repair Cost Maximum</th></tr><tr><td>EFRR020</td><td>Heating Ducts Repair, Replace or Modify</td><td>\$1,500</td></tr><tr><th colspan="3">Heating System Replacements</th></tr><tr><th>Measure Code</th><th>Description</th><th>Replacement Cost Maximum</th></tr><tr><td>EFRT009</td><td>Gas Forced Air 95%</td><td>\$7,500</td></tr><tr><td>ECAS005</td><td>A/C Assessment</td><td>\$300</td></tr><tr><td>WCAS005</td><td>Water Assessment</td><td>\$300</td></tr><tr><td>WCRT045</td><td>Electric to Electric</td><td>\$2,500</td></tr></table>	HE+ HVAC Heating Program Services Cost Limits			Heating System Assessments			Measure Code	Description	Cost Maximum	EFAS005	Heating system Assessment	\$300	Heating System Repairs			Measure Code	Description	Repair Cost Maximum	EFRR020	Heating Ducts Repair, Replace or Modify	\$1,500	Heating System Replacements			Measure Code	Description	Replacement Cost Maximum	EFRT009	Gas Forced Air 95%	\$7,500	ECAS005	A/C Assessment	\$300	WCAS005	Water Assessment	\$300	WCRT045	Electric to Electric	\$2,500	Wx
HE+ HVAC Heating Program Services Cost Limits																																											
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EFRT009	Gas Forced Air 95%	\$7,500																																									
ECAS005	A/C Assessment	\$300																																									
WCAS005	Water Assessment	\$300																																									
WCRT045	Electric to Electric	\$2,500																																									
5.4	All	Technical specifications	5.4 Technical Specifications  <i>Applies to: HVAC-All, Water Conservation</i> The repaired or replaced system is required to be installed per manufacturer's instructions. For exact technical specifications, see Attachment 4 – Technical Specifications for Heating and Cooling System Work for the Wisconsin Weatherization Assistance and Home Energy Plus (HE+) HVAC Program Services available on the HE+ TTA website under Weatherization Procurement Category 6: Services, Attachment 4 – Specifications HVAC.	Wx																																							
5.4.1	Water	Approved activities	HE+ Water Conservation Program Services activities may include, but are not limited to, the following:  <i>Applies to: Water Conservation</i> a. Water heater repair or replacement. b. Collateral work necessary to ensure the unit is installed per manufacturer's instructions and can operate successfully (i.e., floor repairs, shut off valves for other leaks, etc.).	WHEAP Wx																																							
5.4.3	All	HE+ Program Services Final Inspection	The final inspection can be conducted immediately following the completion of the installation. The inspector/installer and the customer (or household member aged 18 or over) must both sign the fully completed HE+ Program Services final inspection checklist.	Wx																																							
5.4.4	All	Collateral Activities	8. Other pre-approved measures. Contact the HE+ Help Desk prior to starting any additional work.	Wx																																							



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
5.5	All	Fuel switch delay	5. Fuel switches can be performed when a natural gas main is extended to new territory and/or a new lateral is installed from the main to a building. See the Fuel Switch Policy heading on the HE+ TTA website under Weatherization Resources Energy Auditing for additional guidance for conversion or replacement. NOTE: In the case of a non-emergency fuel switch when the main and/or lateral natural gas lines have not been installed, or the propane tank hasn't been set, the job must be denied by the weatherization agency and the customer advised to call their WHEAP agency when the installation is complete to request a new referral. Deferrals of HE+ Program Services are not allowed.	
6.2.2	All	AHRI Certification	6.2.2 Additional Document Requirements for Replacements 🏠 <i>Applies to: Wx Agency</i> For replacements, the following documents are required to be uploaded into the HE+ System: All HVAC and water heater replacements are required to meet the minimum Wisconsin Weatherization Assistance Program efficiency standards and the AHRI Directory of Certified Product Performance standards. The AHRI certificate is required to be uploaded to the HE+ System under the associated repository for all HVAC and water heater replacements.	Wx
6.3.2	All	PSQA	6.3.2 Weatherization Agency PSQA Requirements 🏠 <i>Applies to: Wx Agency</i> The contracted agency is responsible for participating in Division-conducted Desktop Monitoring (DTM) HE+ Program Services Quality Assurance (PSQA) activities. This review is not a replacement for an on-site review, but rather a means to ensure that agencies are correctly interpreting and applying HE+ Program Services requirements and policies. Training and Technical Assistance sessions are required as a result of the monitoring activities.	Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
7.1.1	All	Parent applications	7.1.1 Updating Parent Applications <i>Applies to: WHEAP Agency</i> HE+ Program Services applications are linked with the current year WHEAP application, sometimes referred to as a “parent” application. HE+ Program Services request date and service date must be subsequent to the parent application’s “application date.” Program eligibility must be determined, and addresses must be confirmed prior to creating any Program Services referrals. If the WHEAP agency discovers an error, or the applicant is suspected of fraud, contact the HE+ Help Desk and the weatherization agency immediately to ensure the contractor’s work does not continue. Detailed HE+ System Notes are required. Failure to notify the weatherization agency in a timely manner may result in a WHEAP agency repayment of HE+ Program Services. The HE+ System does not allow edits to the address on an unextracted parent application after a Program Services referral has been submitted. Anytime the parent application has been updated after a Program Services referral has been submitted, the HE+ System will place a hold on the referral and the building. In situations where an address needs to be corrected on the parent application, agencies will need to notify the weatherization agency of this change and contact the HE+ Help Desk to have the referral deleted. Once the referral has been deleted, the HE+ System will allow the correction on the parent application, and a new referral can be submitted. Notification to the weatherization agency is required to avoid duplicate efforts in sending contractors to the customer’s home.	WHEAP



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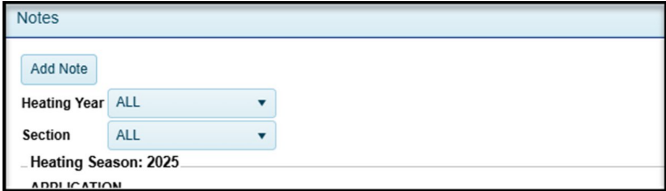
Water Cons.



WHEAP Agency



Wx Agency

1st Mention	Service	Topic	Revision	Focus
7.2	All	HE+ System Notes	7.2Generating Referrals and Reserving Funds: WHEAP Agency <i>Applies to: WHEAP Agency</i> Prior to submitting a referral, the WHEAP worker is required to review all HE+ System Notes related to the household. Workers can access all HE+ System Notes (Program Services, Job, Crisis, etc.) by selecting "All" from the "Heating Year" and "Section" drop-downs in the Notes function.  If the customer has been denied in the past by the weatherization agency, the WHEAP worker is required to contact the weatherization agency to discuss the referral.	WHEAP
Table 7.1	Water	Water Heater Troubleshooting	Is there power to the system? Has electricity been disconnected? LP or fuel oil: Is there fuel in the tank? Have the circuit breakers and on/off switch been checked? Is the exhaust pipe covered or blocked in any way? Has the water heater been turned off and then turned on again? See Appendix C for a Water Heater Referral Troubleshooting informational sheet.	WHEAP



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency