

PY26 Home Energy Plus Program Services Manual

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.

1 st Mention	Service	Topic	Revision	Focus
Chapter 1	All	Availability	Chapter 1 Introduction  <i>Applies to: WHEAP Agency, Wx Agency</i> 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

1 st 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: a. The customer's primary heating system must be inoperable or unsafe, prompting the customer to call for a referral. b. Upon assessment of the heating system, it is discovered that the customer's central air conditioning system is also inoperable or unsafe. c. 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



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1 st Mention	Service	Topic	Revision	Focus
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). <i>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.</i>	WHEAP Wx
1.2	All	Deferrals	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.	Wx
1.2.10	All	Reimbursements	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.	WHEAP Wx



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1 st Mention	Service	Topic	Revision	Focus
1.3	All	Wx-Refs	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. 🏠 <i>Applies to: Wx Agency</i> b. 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



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1 st Mention	Service	Topic	Revision	Focus
2.1.6	All	Delay in Service	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: 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.	WHEAP Wx
2.1.6	All	Invoice deadline	6. Invoice the job in the HE+ System within 30 days of the service date.	Wx



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1 st Mention	Service	Topic	Revision	Focus
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: 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. <i>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.</i> 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.	Wx



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1 st 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. <i>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.</i>	Wx



1 st Mention	Service	Topic	Revision	Focus
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 <u>not</u> make any HE+ Program Services referrals until all SSNs on the HE+ Application have been verified and the HE+ Application is complete. <u>EXCEPTIONS</u> 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. <i>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).</i>	WHEAP
3.2.1	All	Probate Deceased owner	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.	WHEAP



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3.3	All	Rentals	3.3 Rental 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: 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,  <i>Applies to: Wx Agency</i> a. If after the assessment of a failed system the weatherization agency or its subcontractor determines the system has not been in working condition <u>prior</u> to the customer's residency in the home, the weatherization agency is required to receive approval from the HE+ Help Desk <u>prior</u> to proceeding with HE+ Program Services. 2. Buildings that contain a residential <u>and</u> a commercial unit where both the residential and commercial units share a heating system <u>and/or</u> water heater,	WHEAP Wx



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1 st 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 <u>cannot</u> 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. <i>NOTE: The WHEAP worker is required to make detailed notes in the HE+ System. </i> <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



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Wx Agency

1 st Mention	Service	Topic	Revision	Focus
3.5.4	All	Denial reasons	1. The applicant has mistreated and/or altered the operation of the HVAC system or water heater. 2. 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 B for tips on preventing frozen pipes.	WHEAP Wx
3.5.4	All	Customer availability	8. Two or more <u>documented</u> 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> 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.	WHEAP Wx
3.5.4	All	For sale or foreclosed	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.	WHEAP Wx



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3.5.4	All	Delinquent taxes	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. <i>NOTE: Current property taxes are considered delinquent if payment has not been made by October of the current year.</i>	WHEAP Wx
3.5.4	All	Fuel switch	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.	Wx
3.5.5	All	Rental denials	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. <i>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.</i>	WHEAP Wx
3.5.5	All	Denial notifications	e. 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



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4.2	All	Subcontractors	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.	Wx



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4.2	All	Profile Management Administrator (PMA)	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: 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.	Wx



HVAC-All



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WHEAP Agency



Wx Agency

4.3	All	Contact Information Forms	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.   <i>Applies to: WHEAP Agency, Wx Agency</i> 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:  <i>Applies to: WHEAP Agency</i> 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:  <i>Applies to: Wx Agency</i> 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.	WHEAP Wx
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WHEAP Agency



Wx Agency

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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																																							
Table 5.2.2	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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ECAS005	A/C Assessment	\$300																																									
WCAS005	Water Assessment	\$300																																									
WCRT045	Electric to Electric	\$2,500																																									
5.4	All	Technical specifications	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.	Wx																																							



HVAC-All



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WHEAP Agency



Wx Agency

1 st Mention	Service	Topic	Revision	Focus
5.4.1	Water	Approved activities	2. HE+ Water Conservation Program Services activities <i>may</i> 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	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 <u>fully completed</u> HE+ Program Services final inspection checklist.	Wx
5.4.4	All	Collateral Activities	8. Other <i>pre-approved</i> measures. Contact the HE+ Help Desk prior to starting any additional work.	Wx
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.	



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WHEAP Agency



Wx Agency

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6.2.2	All	AHRI Certification	6.2.2 Additional Document Requirements for Replacements  <i>Applies to: Wx Agency</i> For <u>replacements</u>, 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.	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



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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. 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.	WHEAP



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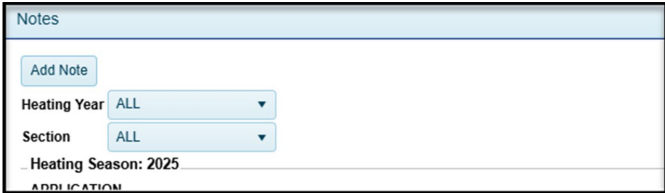
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WHEAP Agency



Wx Agency

1 st Mention	Service	Topic	Revision	Focus
7.2	All	HE+ System Notes	7.2 Generating 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 B for a Water Heater Referral Troubleshooting informational sheet.	WHEAP



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