

PY27 Home Energy Plus Program Services Manual Summary of Changes

Below is a quick reference guide summarizing key changes made to the PY27 HE+ Program Services Manual. The list is not all inclusive of every change, nor is it a direct policy reference. All policy changes listed below are summarized. Please review the entire section in the PY27 HE+ Program Services Manual. Changes in the manual effective as of October 1, 2026, are highlighted in yellow.

1 st Mention	Service	Topic	Revision	Focus
1.2	HVAC-All Water Cons.	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. b. Reimbursement requests are limited to services performed during the current program year only.	WHEAP
1.2	HVAC-All Water Cons.	Resale Restriction	14. Appliances, equipment, and systems installed through HE+ Program Services are provided solely for use at the approved service address and may not be sold, transferred, or otherwise removed for resale. Any customer found to have sold, transferred, or removed program-funded appliances, equipment, or systems for resale purposes may be denied future HE+ Program Services.	WHEAP Wx
2.1.2	HVAC-Heat	Request Date	During the heating season (October 1 to May 15), the local WHEAP agency is required to respond to requests for the HVAC Heating Program within 48 hours* of receiving the request from the customer. The request date for HE+ Program Services is the date the WHEAP agency determines the applicant is eligible for HE+ Program Services. Agencies should ensure that the request date is accurate before submitting a Program Services referral. Eligibility should be determined before creating any Program Services referrals. If the request date and the Program Services referral submission date do not match, an HE+ System note is required explaining the discrepancy.	WHEAP



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1 st Mention	Service	Topic	Revision	Focus
3.2.1	HVAC-All Water Cons.	Co-Owners	3. For all recorded co-owners who are not residing in the home, the agency is required to ask the following questions and record the answers in HE+ System Notes: a. Where does the co-owner currently live? b. How long has the co-owner lived at that address? c. Does the co-owner contribute financially toward the household or housing expenses, including but not limited to property taxes, mortgage payments, utilities, or maintenance? i. If the customer answers 'yes' to this last question, the agency is required to contact the HE+ Help Desk prior to submitting the referral. <i>NOTE: An exception can be made for a recently deceased co-owner (within the current program year). Notes are required to be added in the HE+ System.</i>	WHEAP Wx
3.2.1	HVAC-All Water Cons.	Probate	4. Homes in <u>probate</u> are ineligible for HE+ Program Services. An exception may be considered for a recently deceased homeowner (within the current program year). <i>NOTE: If the property remains titled in the name of the deceased homeowner, contact the HE+ Help Desk to request consideration of a waiver.</i> <i>NOTE: If the homeowner's death cannot be verified through publicly available online records or databases, the agency may be required to obtain additional documentation.</i>	WHEAP Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

1 st Mention	Service	Topic	Revision	Focus
3.2.1	HVAC-All Water Cons.	Homeownership-Trusts	5. 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 resides in the dwelling. a. If the trust is recorded with the county Register of Deeds, document this in the HE+ System. b. If the trust is not recorded with the county Register of Deeds, the customer must provide a copy of the trust document. The entire trust document must be uploaded in the HE+ System.	WHEAP Wx
3.2.2	HVAC-All Water Cons.	Mobile Home Title Verification	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 WHEAP worker is required to assist the customer in obtaining a title by completing the following steps: 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. <i>NOTE: If a customer requests a new HE+ Program Services referral while their DSPS Title application remains in “submitted” status (rather than “active”), the agency must contact the HE+ Help Desk for guidance before taking any further action.</i>	WHEAP Wx
3.4.3	HVAC-All Water Cons.	Flooding	3.4.3 Dwellings Affected by Natural Disaster or Other Flooding Events	WHEAP Wx



1 st Mention	Service	Topic	Revision	Focus
3.4.3	HVAC-All Water Cons.	Deductibles	1. WHEAP-eligible applicants that have an HVAC system and/or water heater damaged by flood, fire, or natural disaster and 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. 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. The customer is required to provide documentation from their insurance company verifying the amount of the deductible. Documentation is required to be uploaded in the HE+ System.	WHEAP
3.4.3	HVAC-All Water Cons.	Relocating Equipment	1. WHEAP-eligible applicants that have an HVAC system and/or water heater damaged by flood, fire, or natural disaster and needing repair or replacement can be referred for HE+ Program Services. d. If a heating system or water heater is replaced due to a natural disaster or other flooding event and cannot be relocated outside the flood-prone area, HE+ Help Desk pre-approval is required before replacing the system again if it is subsequently damaged by flooding.	Wx
3.5	HVAC-All Water Cons.	Denying Services	The Division administers several housing assistance programs that may provide additional options for households in need. The Division website (www.energyandhousing.wi.gov) is an interactive resource designed for both the public and grantees to help identify available assistance. Grantees are expected to incorporate the website into customer interactions by using the County Resources map to identify resources specific to their county or tribe. Agencies should also become familiar with the localized resources available so they can confidently connect customers with appropriate, targeted assistance.	WHEAP Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

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3.5.1	HVAC-All Water Cons.	Ownership Date	12. For homes purchased within one year 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.	WHEAP Wx
3.5.1	HVAC-All Water Cons.	Denials	23. When denying an HE+ Program Services referral, select the appropriate denial reason from the HE+ System drop-down menu. 24. Specific HE+ Program Services denials require prior approval from the HE+ Help Desk before the denial process may begin. a. Refer to the HE+ Program Services Denial Table for the applicable denial reasons and approval requirements. i. The HE+ Program Services Denial Table and searchable HE+ Program Services Denial Table - Excel Tool can be found on the HE+ TTA website under HE+ Program Services Resources	WHEAP
4.1	HVAC-All Water Cons.	HE+ System	2. Maintaining confidentiality of their username and password for the HE+ System. 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.	WHEAP



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4.2	HVAC-All Water Cons.	Profile Management Administrator	6. Appointing no more than two* individuals as HE+ Program Services HE+ System “Profile Management Administrators” (PMA) with a written request to the Division via the HE+ Help Desk. The PMA is responsible for: a. Creating new and maintaining current HE+ System/WisWAP contacts/permissions/user profile information (including review of the user profile name for appropriateness upon creation) within their agency. b. Maintaining current HE+ System/WisWAP user profiles includes: i. Inactivating 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 inactivating user profiles who have been terminated, retired, quit, or otherwise have left the program. NOTE: Any changes to an assigned PMA require written Division approval from the HE+ Help Desk. *If an exception is needed to this limit, please contact the HE+ Help Desk. This request must be submitted on an annual basis.	Wx
4.2	HVAC-All Water Cons.	HE+ System Contact Info	8. Ensuring that all contact information in the HE+ System is up to date. Any changes to weatherization contacts, including key positions (Executive Director, Program Director, Program Manager, and Fiscal staff), are required to be updated in the HE+ System by the agency. The agency is also required to notify the Division via the HE+ Help Desk when there are any changes to key positions.	Wx



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5.2	HVAC-All Water Cons.	Customer Agreement Proxy	If the applicant or an approved household member who is at least 18 years of age is not present to sign the required program forms, a proxy who is at least 18 years of age may sign on the customer's behalf. The Proxy Authorization portion of the HE+ Program Services Customer Agreement must be completed and signed by the individual authorizing services on behalf of the customer prior to any HE+ Program Services being performed. Forms completed or signed after services have been provided are not valid and will not be accepted.	Wx																		
Table 5.1	HVAC-Heat	Measure Cost	<table><tr><th colspan="3">Heating System Fuel Switching Collateral</th></tr><tr><th>Measure Code</th><th>Description</th><th>Cost Maximum</th></tr><tr><td>EFRT060</td><td>Fuel Switching</td><td>\$1500</td></tr></table>	Heating System Fuel Switching Collateral			Measure Code	Description	Cost Maximum	EFRT060	Fuel Switching	\$1500	Wx									
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5.4.1	HVAC-All	Clean And Tune	1. HVAC Program repair activities may include, but are not limited to, the following: g. Clean and tune (must be part of the total repair)	Wx																		



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5.4.2	HVAC-All Water Cons.	Warranty, Replacement Timelines	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. c. If the Weatherization agency receives a referral for a system that is under warranty, the agency is required to deny the referral in the system using the drop-down menu to select 'Services covered under one-year program warranty.' i. In lieu of issuing a denial letter to the customer, the Weatherization agency is required to upload the contractor warranty confirmation in place of the denial letter. <i>NOTE: If a replacement unit requires an additional replacement within one year of the original replacement, the Weatherization agency is required to receive prior approval from the HE+ Help Desk before proceeding with the replacement.</i>	Wx
5.4.4	HVAC-All Water Cons.	Collateral Activities	8. Other pre-approved measures. Contact the HE+ Help Desk prior to starting any additional work. <i>NOTE: Prior approval from the HE+ Help Desk is required if the total combined costs for collateral activities exceed \$1,500 per job.</i>	Wx
6	HVAC-All Water Cons.	Customer Copies	Agencies are required to provide the customer with a copy of the signed HE+ Program Services specific forms (HE+ Program Services Customer Agreement, Space Heater Waiver, work agreement, etc.). Agencies may utilize duplicate forms, have the customer sign two copies onsite, or send a copy via mail. If forms are provided via mail, HE+ System Notes are required citing the date they were mailed to the customer.	WHEAP Wx



HVAC-All



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Water Cons.



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6.2.1	HVAC-All Water Cons.	Invoices	2. Copy of the contractor's itemized invoice(s). a. All invoices are required to include the following: i. Vendor information (company name and contact information) ii. Customer name and service address iii. Invoice number, invoice date, and date(s) work was performed iv. Detailed description of services, equipment, materials, and labor provided v. Itemized costs and total amount due, including any applicable permit fees b. Upload the document under "PS Contractor's Itemized Invoice." <i>NOTE: When work is completed by more than one contractor, or by a combination of a contractor and agency in-house staff, agencies are required to enter HE+ System Notes explaining the reason for multiple invoices and identifying the work performed by each party.</i>	Wx
6.2.2	HVAC-AC, Water Cons.	AHRI	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. The AHRI Certificate is required to be uploaded to the HE+ System under the associated repository for HVAC Air Control (AC) and Air Source Heat Pump replacements.	Wx



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6.3.3	HVAC-All Water Cons.	Fiscal Monitoring	6.3.3 Weatherization Agency Fiscal Monitoring Requirements <i>Applies to: Wx Agency</i> The contracted agency is responsible for participating in Division-conducted quality assurance activities that ensure that agencies are correctly interpreting and applying Weatherization fiscal requirements contained in the contract and policy. The Division will conduct fiscal monitoring of each agency once a year. Program Services fiscal monitoring focuses on the following program areas: - Federal and state fiscal management requirements - Allowable and disallowed costs Weatherization agencies are required to: - Respond to all Division communication within the timeframe or request an extension by the required deadline. Extension requests will be evaluated by the Division and are not guaranteed - Upload a copy of the Agency's General Ledger entries for expenses invoiced for the month the Division requests along with all unredacted supporting documentation for the General Ledger entries including receipts, time sheets, expense reports, monthly statements, etc. - Make changes to fiscal management practices and/or invoices as directed by the Division	Wx
7.1.1	HVAC-All Water Cons.	Parent Applications	If the WHEAP agency discovers an error, or the applicant is suspected of providing inaccurate information, 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 to document all updates made to the case, including address changes.	WHEAP
7.2	HVAC-All Water Cons.	Generating Referrals	Prior to submitting a referral, the WHEAP worker is recommended to review all HE+ System Notes and previous referrals related to the household.	WHEAP



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Water Cons.



WHEAP Agency



Wx Agency

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7.3	HVAC-All Water Cons.	Service Date	3. All jobs must be invoiced in the HE+ System within 30 calendar days of the service date. b. Agencies must enter the service date into the HE+ System within a reasonable time of service occurring.	Wx
7.4.1	HVAC-All Water Cons.	Natural Disaster	8. Was the home affected by a natural disaster? 9. Is the home for sale, bankruptcy, or foreclosure? 10. Is the customer two or more years delinquent on property taxes? Additional guidance: - All auto populated HE+ System Notes questions must be answered. Do not delete any auto-populated questions. - Workers must answer all questions before submitting an HE+ Program Services Referral. "Yes" responses to questions 8-10 require the agency to contact the HE+ Help Desk for guidance.	WHEAP
7.5	HVAC-All Water Cons	Program Eligibility Review	7.5 HE+ Program Eligibility Review (PER) Policy and Process <i>Applies to: WHEAP Agency, Wx Agency</i> To ensure program integrity and establish uniform processes, the Division has created a Program Eligibility Review (PER) policy and process to support WHEAP and weatherization agencies. The PER process uses a collaborative approach to gather customer verifications and complete a program eligibility review.	WHEAP Wx
7.5.1	HVAC-All Water Cons	Program Eligibility Review	7.5.1 WHEAP – Program Eligibility Review <i>Applies to: WHEAP Agency</i> When the WHEAP agency discovers discrepancies on reported information: - Contact the HE+ Help Desk with the PID, customer name, and a summary of details. - The WHEAP agency shall contact the weatherization agency to ensure that any in-progress work does not continue until the eligibility review has been completed.	WHEAP



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			• Enter detailed HE+ System Notes describing the situation or concern. • The Division will conduct a Program Eligibility Review based on the information received. • The WHEAP agency in the county where the customer's parent application was processed will receive directions on the next steps to resolve the discrepancy. • The WHEAP agency will contact the customer to request verification documents and confirm program eligibility information. • The WHEAP agency will send a certified letter to the customer using the Energy Assistance Program Eligibility Review Notice. The template can be found on the HE+ TTA website under WHEAP Forms and HE+ Program Services Forms. • A copy of the certified letter and payment receipt must be uploaded to the Other WHEAP Documents repository in the HE+ System. • A repayment agreement is sent to the customer by the WHEAP agency (when applicable). • Agencies shall take appropriate action and respond within the timeframe provided by the Division. In the case of any claim or statement made by any individual (case head or other household member(s) relating to any of the benefits received, the individual(s) may be held liable for penalties and assessments under the Code of Federal Regulation Title 45, Subtitle A, Section 79.3. Upon completion of the desktop eligibility review, the Division will determine if any benefits (LIHEAP, PB, Crisis, Program Services, and/or Weatherization) were awarded to applicants who were not eligible, or if a benefit overpayment occurred. • If it is determined that the application was not eligible or benefit overpayments exceeded \$100, the Division will proceed with a cancel/refund with the current program year application. • If eligibility is unable to be determined due to no response from the customer, the Division may proceed with a cancel/refund of the current year program application. • If an applicant was not eligible or had a benefit overpayment for any of the five previous program year application(s), the agency shall complete an	



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			HE+ Repayment Agreement with the customer for any benefits affected by the inaccurate information. The Division will provide guidance in cases where repayment may not be required. Refer to Section 8.9 in the WHEAP Manual if there is a need for an HE+ Repayment Agreement. In situations where an HE+ Repayment Agreement is in place, the agency shall seek Division approval for Crisis Assistance, HE+ Program Services, and Weatherization referrals. Once the referral has been resolved, the WHEAP agency will receive an email confirming the case is closed. HE+ System Notes are required for all program eligibility review cases.	



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency

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7.5.2	HVAC-All Water Cons	Program Eligibility Review	7.5.2 Weatherization – Program Eligibility Review 🏠 <i>Applies to: Wx Agency</i> When the weatherization agency discovers discrepancies on reported information: • Immediately pause the weatherization and/or Program Services job. • Contact the HE+ Help Desk with the PID, customer name, and a summary of details. • Contact the WHEAP agency to ensure they are made aware of the discrepancy. • Enter detailed HE+ System Notes describing the situation or concern. • The Division will conduct a Program Eligibility Review based on the information received. • The WHEAP agency in the county where the customer’s parent application was processed will receive directions on the next steps to resolve the discrepancy. • Once the referral has been resolved, the weatherization Agency will receive email confirmation of the customer’s eligibility status. The WHEAP Manual refers to Section 8.9 to ensure compliance with maintaining a file of overpayments. To maintain program integrity, agencies shall ensure compliance with all applicable elements of Appendix A in the WHEAP Manual. If requested by the Division, agencies shall identify all steps taken to comply with Appendix A.	Wx
7.5.3	HVAC-All Water Cons	Program Eligibility Review	7.5.3 HE+ Agency Staff Referral 🧑🏠 <i>Applies to: WHEAP Agency, Wx Agency</i> Report all incidents of potential or substantiated HE+ System misuse by agency staff to the HE+ Help Desk. The Division will instruct the local agency to inactivate the agency staff’s HE+ System contact, which will then inactivate their user profile, while the investigation is completed by the local agency. WHEAP and weatherization agencies are required to have processes in place to resolve incidents of HE+ System misuse.	WHEAP Wx



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8.4	HVAC-All Water Cons.	Admin Expenses	<i>NOTE: When Program Support Costs exceed 15% or Administration Expenses exceed 10% on a monthly invoice, agencies must upload supporting financial documentation (monthly general ledger detail or profit and loss statement) into the HE+ System prior to invoice approval.</i>	Wx
8.5	HVAC-All Water Cons.	Program Support Expenses	<i>NOTE: When Program Support Costs exceed 15% or Administration Expenses exceed 10% on a monthly invoice, agencies must upload supporting financial documentation (monthly general ledger detail or profit and loss statement) into the HE+ System prior to invoice approval.</i>	Wx
Definitions	HVAC-All Water Cons.	HE+ System	Home Energy Plus System (HE+ System) The Division's web-based data management system used by WHEAP, Weatherization and Program Services to manage and exchange program information between local agencies and the Division. The HE+ System supports program eligibility and case management, maintains customer, building, and unit records, tracks program activities and costs, and supports financial management, reporting, and invoicing of program expenditures. The HE+ System is located at: https://heplus.wi.gov	WHEAP Wx
Definitions	HVAC-All Water Cons.	Request Date	request date The request date for HE+ Program Services is the date the WHEAP agency determines the applicant is eligible for HE+ Program Services and submits the request to the Weatherization agency. For a Weatherization referral (Wx-REF), the request date is the date of referral from the weatherization agency.	WHEAP Wx



HVAC-All



HVAC-A/C



HVAC-Heating



Water Cons.



WHEAP Agency



Wx Agency