

PY 24 HE+ Program Services | Summary of Changes

Below is a quick reference guide summarizing key changes made to the PY24 HE+ Program Services Manual. The list is not all inclusive of every change, nor is it a direct policy reference. All policies listed below shall be reviewed in entirety in the full PY24 HE+ Program Services Manual. Changes in the manual effective as of October 1, 2023 are highlighted in yellow.

Manual Section	Program Service	Topic	Revision	Focus (WHEAP/Wx)
Disclaimer	Furnace Water	Summary of changes	<i>See Appendix A for a summary of changes made to the PY24 HE+ Program Services Manual.</i>	WHEAP Wx
Disclaimer	Furnace Water	Icons	<i>NOTE: Content related to a specific HE+ Program Services program and/or specific to the WHEAP or WAP agency is identified by icons at the end of the related text. An icon key is provided in the footer of each page of this manual.</i>	WHEAP Wx
1	Water	Public Benefits	<i>NOTE: Customers must live in the territory of a Public Benefit utility in order to qualify for HE+ Water Conservation Program Services.</i>	WHEAP Wx
1.1	Furnace	Heat pumps	<i>NOTE: If the customer has a heat pump, please contact the HE+ Help Desk for assistance with identifying the primary heat source.</i>	WHEAP Wx
1.1	Furnace Water	Reimbursement	Reimbursement of applicant expense is not allowed when an HE+ Program Services issue is repaired or replaced by the applicant, or a contractor hired by the applicant. <i>NOTE: If a reimbursement request is received, contact the HE+ Help Desk.</i>	WHEAP Wx
2	Furnace Water	HE+ System Notes	<i>HE+ System Notes explaining reasons for the delay must be entered when any timeline response requirements are not met.</i>	WHEAP Wx
2.1	Furnace Water	Urgent safety concern	2. Non-heating season: Wisconsin's non-heating season is May 16 through September 30. HE+ Furnace Program Services referrals generated during the non-heating season are typically considered Non-Emergency HE+ Furnace Program Services referrals unless there is an urgent safety concern . In the case of an urgent safety concern , emergency timelines apply.	WHEAP Wx
2.1	Furnace Water	Urgent safety concern	<i>NOTE: "Urgent safety concern" is a new phrase that replaces "Health and Safety" as used in previous manuals. In determining whether the situation is an urgent safety concern, the worker shall</i>	WHEAP Wx

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			<i>consider the expected low temperature for the next 72 hours, if there are signs of elevated carbon monoxide in the home, and whether the household has any vulnerable individuals (elderly, disabled, or children under six). For more information on carbon monoxide and its effects on health, see Appendix E for a Carbon Monoxide Information Sheet.</i>	
2.1.1	Furnace	Relocation	The local WHEAP agency is responsible for verifying that applicants waiting for HE+ Furnace Program Services (emergency and non-emergency referrals) have access to temporary heat and whether the customer chooses to remain in the home until the heating situation is addressed.	WHEAP
2.1.1	Furnace	Relocation	<i>EXCEPTION: For weatherization referrals, the Weatherization agency is responsible for verifying the customer has access to temporary heat and whether the customer chooses to remain in the home until the heating situation is addressed.</i>	Wx
2.1.6	Furnace Water	Creating Job ID	During the heating season, (October 1 to May 15), the Weatherization agency shall: 2. Create a Job ID within three business days of receiving the referral. <i>NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes shall be made in the HE+ System explaining the delay.</i>	Wx
2.1.6	Furnace Water	Adding HE+ System Notes	During the heating season, (October 1 to May 15), the Weatherization agency shall: 3. Enter initial HE+ System Notes within three business days of referral receipt.	Wx
2.1.6	Furnace	Delayed Response HE+ System Notes	During the heating season, (October 1 to May 15), the Weatherization agency shall: 4. 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 shall document in HE+ Furnace Program Services System Notes all of the following:	Wx

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			<ul style="list-style-type: none"> 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. 	
2.1.7	Furnace	Creating Job ID	<p>During the non-heating season (May 16 - September 30), the Weatherization agency shall:</p> <p>2. Create a Job ID within three business days of the referral receipt.</p> <p><i>NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes shall be made in the HE+ System explaining the delay.</i></p>	Wx
2.1.7	Furnace	Adding HE+ System Notes	<p>During the non-heating season (May 16 - September 30), the Weatherization agency shall:</p> <p>3. Enter initial HE+ System Notes within 10 business days of referral receipt.</p>	Wx
2.1.7	Furnace	Urgent safety concern	<p>During the non-heating season (May 16 - September 30), the Weatherization agency shall:</p> <p>4. If the situation is an urgent safety concern:</p> <ul style="list-style-type: none"> a. Respond within 24 hours. b. Create a Job ID within three business days of referral receipt. <p><i>NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes shall be made in the HE+ System explaining the delay.</i></p> <ul style="list-style-type: none"> c. Enter HE+ System Notes within three business days of referral receipt documenting the details of the potential safety concern. 	Wx
2.2.2	Water	Creating Job ID and HE+ System Notes	<p>The Weatherization agency shall:</p> <p>1. Verify that the building criteria for HE+ Water Conservation Program Services are met and a Water Conservation Program assessment is conducted within 10 business days</p>	Wx

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			<p>of receiving the HE+ Program Services referral from the WHEAP agency.</p> <p>2. Create a Job ID within three business days of referral receipt.</p> <p><i>NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes shall be made in the HE+ System explaining the delay.</i></p> <p>3. Enter initial System Notes within three business days of referral receipt.</p> <p>4. If the situation is an urgent safety concern, respond within 24 hours. An urgent safety concern also includes reports of backdrafting.</p>	
3.1.1	Furnace Water	Owners with multiple dwellings	In situations involving landlords who own multiple rental units, the worker must contact the HE+ Help Desk for approval prior to generating the HE+ Program Services referral for the tenant.	WHEAP
3.1.2	Furnace Water	Referrals without SSN verification	Agencies shall <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.	WHEAP
3.2.3	Furnace Water	Tribal attestation of homeownership typed signature	The attestation form must be signed (either manually or typed) and dated by a tribal official.	WHEAP Wx
3.3.2	Furnace Water	Certification Page	<i>NOTE: Online applications do not have a physical Certification Page. When online application customers apply, they are provided with the Certification Page language prior to submission. The Certification Page can be used for five years starting with Program Year (PY) 2021.</i>	WHEAP
3.3.2	Furnace Water	Owners with multiple dwellings	<i>NOTE: In situations involving landlords who own multiple rental units, the WHEAP worker must contact the HE+ Help Desk for approval prior to generating the HE+ Program Services referral for the tenant.</i>	WHEAP
3.4.2	Furnace Water	Ineligible dwellings and structures	<p>Ineligible dwellings include but are not limited to:</p> <p>5. Secondary home (e.g., vacation home, seasonal home, Airbnb)</p>	WHEAP Wx
3.5.1	Furnace Water	Deferrals	Grantees shall not simply defer service without pursuing other options and attempting to identify other resources to address the identified hazard(s). Grantees may defer HE+ Program Services to the	Wx

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			customer until the repair or urgent safety concern is addressed with other funds.	
3.5.3	Furnace Water	Deferral deadlines	<ol style="list-style-type: none"> 1. The Weatherization agency shall maintain their own system for keeping track of deferral deadlines. <ol style="list-style-type: none"> a. The Weatherization agency shall make this record available to the Division upon request 	Wx
3.5.3	Furnace Water	Photos	<ol style="list-style-type: none"> 2. HE+ System Documentation <ol style="list-style-type: none"> a. Pictures documenting the reason for deferral (if applicable) are required and shall be uploaded into the HE+ System. <p><i>NOTE: Photos must be labeled and identify the picture when uploading into the HE+ System. Photos and documents shall be uploaded in the correct document upload repository in the HE+ System.</i></p> 	Wx
3.5.4	Furnace Water	Denial of services	<p>HE+ Program Services shall be denied when:</p> <ol style="list-style-type: none"> 1. The heating system, water heater, and/or supply system is working as it should and there is not an urgent safety concern to the applicant household. 	WHEAP Wx
3.5.5	Furnace Water	Notice of denial	<p>WHEAP Agency Requirements</p> <ol style="list-style-type: none"> 1. 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. 	WHEAP
3.5.5	Furnace Water	Notice of denial	<p>Weatherization Agency Requirements</p> <ol style="list-style-type: none"> 2. 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. 	Wx
3.5.5	Furnace Water	Denial letters to customers	<p>Weatherization Agency Requirements</p> <ol style="list-style-type: none"> 5. Deny the referral in the HE+ System. <ol style="list-style-type: none"> a. 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 notes in the HE+ System and upload the denial letter. b. If there are no charges to be attached to the job, click “Deny-No Cost”, select the denial 	Wx

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			<p>reason, add System Notes, and upload the denial letter in the HE+ System.</p> <p><i>NOTE: Sending a letter of denial to the customer is mandatory and the Weatherization agency shall not click "override" to bypass policy.</i></p>	
5.2	Furnace	Total job costs	1. Total costs for HE+ Furnace Program Services shall not exceed \$10,000 per job.	Wx
5.2	Water	Total job costs	2. Total costs for HE+ Water Conservation Program Services shall not exceed \$6,000 per job. <ul style="list-style-type: none"> a. Maximum funds are reserved in the HE+ System when referrals are entered. 	Wx
5.2	Furnace Water	Total job costs	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. <ul style="list-style-type: none"> a. The Weatherization agency shall respond and/or make the information available upon request within the required timeline. 	Wx
5.2	Furnace Water	Total measure costs	4. When maximum costs for HE+ Program Services measures are exceeded, the Weatherization agency will need to request an override from the Division. <ul style="list-style-type: none"> 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. b. The Division may request additional information or deny any override request where detailed reasons for the overage are not provided. 	Wx
5.2	Furnace Water	Measure costs table	See tables below for specific measure cost limits.	Wx
5.2	Furnace	Wood burning heating systems	<i>*NOTE: Prior approval from DEHCR is required before installing any wood burning heating systems. The measure can only be activated by DEHCR staff.</i>	Wx

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			Contact the HE+ Help Desk before any work is started for approval.	
5.4	Furnace Water	Efficiency guidelines	IMPORTANT: 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.	Wx
5.4.1	Furnace Water	In-person inspections	5. The local Weatherization agency, or its inspection subcontractor, shall conduct an in-person final inspection within 2 weeks of installation on all heating system and water heater replacements.	Wx
5.4.1	Furnace Water	Final inspection – no response from customer	a. A copy of the letter shall be uploaded in the HE+ System.	Wx
5.4.1	Furnace Water	Checklist	7. The Weatherization agency, or its subcontractor, shall provide the fully completed replacement heating system checklist and/or water heater installation checklist upon final inspection. Checklists are located on the HE+ TTA website under HE+ Program Services Forms. The first page of the checklist is a required upload in the HE+ System.	Wx
5.4.1	Water	Customer survey	8. An HE+ Water Conservation Program Services customer survey shall be completed over the phone with the customer within 10 days of the service date for all HE+ Water Conservation Program Services jobs. <ul style="list-style-type: none"> a. A sample survey is located on the HE+ TTA website under HE+ Program Services Forms. b. Results of the survey must be documented in System Notes or uploaded to the HE+ System within 10 days of the service date. If the customer is unresponsive after three documented attempts, detailed notes must be made in the HE+ System. c. Surveys are not required for denials or assessments. 	Wx
5.6	Furnace	Unvented	Unvented space heaters present an urgent safety concern for household occupants.	Wx
6.2.1	Furnace Water	Photographs	The following documents shall be uploaded into the HE+ System where applicable:	Wx

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			2. Photographs documenting: <ol style="list-style-type: none"> The existing system conditions The manufacturer's name plate Installer's information, contact number, and date of installation The instruction manual left by the contractor 	
6.2.2	Furnace Water	Multiple dwellings	<i>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.</i>	WHEAP Wx
6.3.1	Water	PSQA Requirements	<p>WHEAP agencies shall ensure the internal PSQA is conducted twice per program year: once by January 31 for October to December activity, and once by May 31 for January to April activity. The review shall also include the original or "parent" HE+ Application associated with the Program Service(s) to ensure that eligibility and benefits were accurately determined. WHEAP agencies shall upload their completed internal PSQA review to their current WHEAP contract in the HE+ System within three business days of the January 31 and May 31 deadlines. All activity shall use the Division Program Services Quality Assurance tool, and include an annual minimum of:</p> <ul style="list-style-type: none"> Five repair cases, or 10% of the total repair cases (whichever is greater) Five replacement cases, or 10% of the total replacement cases (whichever is greater) Five HE+ Water Conservation Program Services cases, or 10% of the total cases (whichever is greater) 	WHEAP
6.3.2	Furnace Water	Program Services Quality Assurance	<p>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 may be required as a result of the monitoring activities.</p> <p>Weatherization agencies are required to:</p>	Wx

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			<ul style="list-style-type: none"> 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 the specified times as determined by the Division. 	
7.2	Furnace Water	HE+ System Notes	1. Prior to submitting a referral, the WHEAP worker shall review all HE+ System Notes related to the household.	WHEAP
7.2	Furnace Water	Multiple dwellings	2. For those who live in rented mobile or manufactured homes, rented single-family homes, and buildings with 2-4 units, a copy of the property owner's most recent filed taxes return including Tax Form 1040 and supporting schedules must be uploaded into the HE+ System. <ol style="list-style-type: none"> 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. 	WHEAP
7.2	Furnace Water	Telephonic signature	3. The WHEAP agency must upload into the HE+ System copies of the property owner's signed certification page or telephonic signature, homeownership record, and tax forms if not already uploaded. If the property owner resides in a different county/tribe, the worker must verify that the property owner's signed Certification Page or telephonic signature, homeownership record, and tax forms have been uploaded into the HE+ System.	WHEAP
7.2	Furnace Water	Certification Page	<i>NOTE: Online applications do not have a physical Certification Page. When online</i>	WHEAP

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			application customers apply, they are provided with the Certification Page language prior to submission. The Certification Page can be used for five years starting with Program Year (PY) 2021.	
7.2	Furnace Water	Address	REMINDER: The address on the Program Services referral must match the address on the HE+ Application. If the address is incorrect, a new HE+ Application shall be created.	WHEAP
7.2	Furnace Water	Funds	8. 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 shall immediately contact the Weatherization agency to inform them the referral has been denied.	WHEAP
7.2.1	Furnace Water	Troubleshooting	The WHEAP worker shall discuss the customer's reported problem with them in order to gather as much information as possible and to troubleshoot the issue. This information shall be conveyed to the Weatherization agency in the initial referral email.	WHEAP
7.2.1	Furnace Water	Urgent safety concern	NOTE: If there is an urgent safety concern, the WHEAP worker shall note the situation in the initial referral email by typing: *Urgent Safety Concern* (with asterisks) and then going into greater detail.	WHEAP
7.2.1	Furnace Water	Assessment questions	The following questions must be inquired by the WHEAP worker and be recorded in the initial referral notes sent to the Weatherization agency: 1. All HE+ Program Services referrals: o Is there anything in the home that may prevent the contractor from assessing the heating and/or water conservation system? (Example: Pets, rooms that are closed off, broken steps, etc.)	WHEAP
7.2.1	Furnace Water	Furnace referral questions for customer	2. HE+ Furnace Program Services referrals: o When was the last time the heating system was working? o What is the current temperature in the home? o When was the furnace filter last changed (if applicable)?	WHEAP

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			<ul style="list-style-type: none"> ○ Has the thermostat battery been changed? ○ What is the household doing to keep warm? ○ Can the customer secure temporary heat or another location to stay? 	
7.3	Furnace Water	Job ID	<ul style="list-style-type: none"> ● The Weatherization agency shall create a Job ID and enter System Notes within three business days of all referral receipts. <i>NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes shall be made in the HE+ System explaining the delay.</i> 	Wx
7.4	Furnace Water	HE+ System Notes	Please see Appendix C for a compilation of required HE+ System Notes.	WHEAP Wx
7.4.1	Furnace Water	HE+ System Notes	<p>The WHEAP agency must include the following in System Notes:</p> <ul style="list-style-type: none"> ● What steps were taken to verify the well-being of the residents. ● Whether the customer chooses to remain in the home until the heating situation is addressed. 	WHEAP
7.4.1	Furnace	Space heater waiver	<p>The WHEAP agency must include the following in System Notes:</p> <ul style="list-style-type: none"> ● If the agency offers space heaters, System Notes shall include whether the customer accepted the offer and how many space heaters were provided. <p><i>NOTE: Agencies offering space heaters to customers shall 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 shall be uploaded in the HE+ System under "Other WHEAP Documents".</i></p>	WHEAP

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7.4.1	Furnace Water	Multiple dwellings	<p>The WHEAP agency must include the following in System Notes:</p> <ul style="list-style-type: none"> For rental referrals, the WHEAP agency must include in the initial HE+ System Notes that the property owner is WHEAP eligible and tax forms were used to verify rental income. See Section 3.3 for more information on rental dwelling requirements. <p><i>NOTE: If the homeowner or dwelling owner of the rental unit of the rental unit does not file taxes or owns multiple dwellings, contact the HE+ Help Desk prior to sending a referral.</i></p>	WHEAP
7.4.2	Furnace Water	Job ID	<p>The Weatherization agency shall create a Job ID and enter initial System Notes within three business days of all referral receipts.</p> <p><i>NOTE: If the agency needs to wait until the next extraction to create a Job ID, HE+ System Notes shall be made in the HE+ System explaining the delay.</i></p>	Wx
7.4.2	Furnace	Space heaters	<ul style="list-style-type: none"> If the Weatherization agency or their contractor offered space heaters to the customer, System Notes shall include whether the customer accepted the offer and how many space heaters were provided. 	WHEAP Wx
7.4.1 7.4.2	Furnace	Space heater waiver	<p><i>NOTE: Agencies offering space heaters to customers shall 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 shall be uploaded in the HE+ System under "Other WHEAP Documents".</i></p>	Wx
7.4.2	Furnace	Well-being	<ul style="list-style-type: none"> If any timeline requirements will be exceeded, the Weatherization agency shall document in System Notes all of the following: <ul style="list-style-type: none"> The reason for the delay Verification of the well-being of the residents 	WHEAP Wx
8.5	Furnace Water	Transportation Costs	<p>7. Direct staff time related to conducting the final inspection for system replacements.</p>	Wx

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			<p>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.</p>	
Appendix B	Furnace	Wood-burning	<p>NOTE: Prior approval from DEHCR is required before installing any wood-burning heating systems. The measure can only be activated by DEHCR staff. Contact the HE+ Help Desk before any work is started for approval.</p>	WHEAP Wx
Appendix B	Furnace	Space heaters	<p>unvented space heaters Unvented space heaters present an urgent safety concern for household occupants. When a contractor or final inspector finds an unvented space heater in a home, the customer shall immediately be encouraged to have the unit removed or disabled. The Weatherization agency shall 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 shall be uploaded into the HE+ System.</p>	WHEAP Wx
Appendix B	Furnace Water	Urgent safety concern	<p>urgent safety concern In determining whether the situation is an urgent safety concern, the worker shall consider the expected low temperature for the next 72 hours, if there are signs of elevated carbon monoxide levels in the home, and whether the household has any vulnerable individuals (elderly, disabled, or children under six). See also backdrafting.</p>	WHEAP Wx
Appendix C	Furnace Water	HE+ System Notes	<p>Entering detailed HE+ System Notes is the best way to ensure good communication between WHEAP and Weatherization workers. As a best practice, workers shall create HE+ System Notes when any new information is available, including new customer interactions.</p> <p>The following are instances where HE+ System Notes are required by policy. Please note that workers must read each indicated policy in its entirety for full information about the required HE+ System Notes.</p>	WHEAP Wx