

LIURP Procedures (Overview)

- I. **Columbia Gas *Cognos* can be queried to provide a listing of income eligible customers that have not been weatherized with the highest consumptions to the Weatherization Specialist.**

- II **The *Weatherization Specialist* will:**
 - A. Pre-screen customers identified on the list (as well as self-referred customers) when contractors request more referrals. Prioritize CAP customers.
 - B. Send a request for documentation to the customers and/or property owner as necessary.
 - C. Verify DIS data found in Vision Customer Data form. Complete the Vision LIURP data form as necessary including usage period used.
 - D. In Vision, send a letter to the customer explaining that a contractor will be contacting them to set up an appointment.
 - E. In Vision, Assign a contractor and approve for LIURP

- III **The *Weatherization Contractor* will:**
 - A. Contact the customer, schedule the audit & document successful and unsuccessful contact attempts in Vision on Events tab
 - B. Notify the heating contractor to complete the clean and tune and assign the contractor in Vision.
 - C. During combustion testing and draft analysis, it is the responsibility of the auditor to check for gas leaks with a gas sniffer, check for CO in the flue (this will be confirmed by the HVAC company during the clean and tune, but high CO is a good indication that there is improper combustion), and check for draft. If there is CO in the flue, a Columbia Gas technician does not need called out. If there is a drafting issue or gas leak, a Columbia Gas technician needs called out immediately and the auditor stays at the house to discuss and confirm findings with the technician. It is important that the equipment is red tagged if needed at the time of the audit. The emergency number to call is 1-888-460-4332.
 - D. Complete the audit or truncate depending on H&S issues.
 - E. Enter scheduled clean & tune date in Vision on Events tab if known.
 - F. Upload all audit documents in Vision on Files tab on the correct LIURP project.
 - G. Enter Audit completion date in Vision under Events tab.

- H. Send *repairs needed* letter to homeowner/property owner, if necessary through Vision.
- I. Request approval to spend over Soft CAP Max limit by e-mail to Quality Assurance Coordinator (juliewilson@nisource.com)
- J. Update *clean & tune completion date in Vision on Events tab*.
- K. Update *Demographics* in Vision on Customer Data form verification section and required for completion form.
- L. Notify *Weatherization Specialist* of any customer who is over income for the program by updating the Verification section of the Customer data form in Vision.
- M. Complete the Audit measure on the Equipment tab in Vision Send CAP possible cancellation letter through Vision, if necessary.
- N. Cancel/Reject any jobs pending over 30-60 days.
 - a. Send letter to customer in Vision notifying them of cancellation or rejection.
 - b. Update Vision LIURP data form and required for Completion form of cancellation or rejection and reason.

IV. The Heating Contractor/Service Department will:

- A. It is important that the weatherization contractor communicate with the HVAC company whether the customer is a renter or owner.
- B. ALL customers get a clean and tune regardless of whether they rent or own.
- C. Complete the "Clean & Tune."
- D. Call the weatherization contractor to notify that the work is complete.
- E. Notify the weatherization contractor of any problems or repairs necessary.
- F. If the customer is a renter and issues are found at the time of the clean and tune by the HVAC contractor, we can spend up to \$650 in repairs (excluding the clean and tune). If repairs go beyond \$650, and there is an unsafe situation, (for example, gas leaks or drafting issue), a Columbia Gas technician needs called at the clean and tune by the hvac contractor on the emergency line at 1-888-460-4332. We would not continue with weatherization due to the failed hvac findings. The landlord is responsible at that point to correct all issues. Remember that weatherization cannot commence until hvac is cleared and safe. The HVAC company will report this information back to the weatherization contractor. The

weatherization contractor explains to the customer that weatherization cannot happen until the landlord fixes all issues. The customer can call the landlord directly, if not the weatherization contractor should reach out to the landlord and explain the situation. Landlord numbers and addresses are listed in Vision, or Jackie Martin (724-416-6361) can be called directly.

- G. If the customer is an owner and H&S issues are found at the time of the clean and tune, a Columbia Gas technician needs called immediately if the issues cannot be repaired within the same day. HVAC can repair or replace equipment for customers that are owners at no cost to the customer.
- H. Send completed appliance inspection worksheets to the weatherization contractor.
- I. Send Invoice to *Weatherization Specialist* for processing, if necessary.

i. The *Weatherization Contractor* will:

- A. Consult with the *Outreach & Education Coordinator*, if necessary and document CARES referral in Vision.
- B. Authorize repairs within same day of service (if cold weather) and within 48 hours (if warm weather) and identify Columbia Gas as the responsible party to invoice.
- C. Complete the repair authorization form in Vision as necessary

ii. The *Heating Contractors* will:

- A. Insure heat or auxiliary heat within 24 hours during cold weather.
- B. Complete repairs/replacements as soon as possible.
- C. Notify the weatherization contractors when work is completed.
- D. Send invoice to *Weatherization Specialist* for processing.

V. The *Weatherization Contractors* will:

- A. Complete weatherization after all repairs are completed.
- B. Update Vision with completion status.
- C. Enter weatherization measures in Vision. Print or save invoice report.
- D. Upload appliance inspection sheet, invoice report, KAIR form, internal post inspection form and all other supporting documentation to the correct project in Vision under the files tab.
- E. Verify all required information is entered on the required for completion tab in Vision.
- F. Send invoice to *Weatherization Specialist via email or US Postal Service. All supporting documentation should be uploaded into Vision and should not accompany invoice.*

VI. The *Weatherization Specialist* will:

- A. Process all “clean and tune”, “repair” and post inspection invoices.
- B. Update and upload Vision with measures and invoices from contractors for repairs and clean & tunes.
- C. Process all weatherization and audit invoices through Vision.
- D. Verify all required data is entered into Vision.
- E. Complete the LIURP Checklist & insure all forms are found in Vision appropriately.
- F. Refer all cancelled CAP jobs to Universal Service Liaison if no contact or Outreach and Education Coordinator if customer refused

VII. The *Quality Assurance Coordinator* will:

- A. Assign post inspections to contractors in Vision. A minimum of 25% of each contractor completions should be post inspected.
- B. Ensure all inspection emergency findings are handled same day.
- C. Ensure all inspection non-emergency findings are followed up on by HVAC or weatherization contractors as appropriate.
- D. Ensure all documentation, pictures and subsequent notes are uploaded into Vision under files tab.
- E. Send invoice for processing to Weatherization Specialist.