

IBA Home Energy Conservation Program Contractor Procedures (2011)

ACCEPT CLIENT, SET UP APPOINTMENT, ORDER NECESSARY MATERIALS

- ❑ Review work order and timeline expectations for job as work will need to be completed as quickly as possible.
- ❑ Respond to e-mail – yes to accept client or no to reject client (48 hours to respond). If no answer within 48 hours, client may be reassigned.
- ❑ Mechanical work (HVAC, plumbing, and electrical) must be completed prior to Shell work when the clients home has gas appliances and the work order has items selected that require and interim audit.
- ❑ Call client and setup appointment within 24 hours of accepting client. Make appointment date no more than one week later than date of call. Put notes in client's on-line file under work order note for date of call to client (if left message) and date scheduled to perform work. The home must have permanent heat to be weatherized. If gas is turned off and the client has gas appliances we must wait until the gas is turned on. Notify IBA of the situation.
- ❑ Furnace and fiberglass must be ordered through central purchasing by calling Kim at 1-800-377-6334 ext. 215 or by e-mailing her at Kim@BuildIndiana.org.
- ❑ Order any other necessary materials.

ON-SITE

- ❑ Re-print work order to make sure most current work is being performed.
- ❑ Print Moisture Assessment Form from client's on-line file.
- ❑ Reminder call to client. IBA recommends a call the evening before and again before leaving to travel to client's home. IBA can not reimburse for a trip that results in non-entry into the house. A contractor may not perform any work if primary heat source is unavailable.
- ❑ Upon arriving at the client property, knock and introduce yourself as a contractor for the IBA Home Energy Conservation Program. Show identification if the client requests. If client does not answer door (1st missed appointment) then leave an IBA door hanger filled in with your information and the 1st missed appointment box checked and call client to reschedule. If client does not answer door (2nd missed appointment) then leave an IBA door hanger filled in with your information and the second missed appointment checked and notify IBA Client Services Manager.
- ❑ Inspect house to make sure moisture issues are not present. Sign IBA Moisture Assessment form identifying that energy conservation "will" proceed. Identify changes (if any) to moisture issues in the home. If major moisture issues are noticed. Call IBA immediately.
- ❑ Confirm all items are on work order that are necessary to complete job. If additional items are necessary, stop and call the IBA Production Management Team for approval of any recommended change orders. Contractor is responsible for doing what is ordinary and customary in his field of expertise. If you are at a client's home and there is obvious work needing to be repaired, we will allow you up to \$200.00 without approval BUT payment of these charges will be reviewed and if deemed unnecessary will not be paid. **A Special Circumstance Item may be ordered when an item is necessary that needs to be completed in order for the greatest potential of energy savings and determined not to be performed on a regular basis. IBA requires that charges for special circumstance items are based on time and material with a set standard for an hourly rate. IBA requires its contractors to utilize a set hourly labor rate based on the prevailing wage for each contractor's applicable county. IBA requests that invoices are broken down by labor and materials. At least two cost comparisons are required for the material cost of a special circumstance item.**

- ❑ Complete items on work order. Contact IBA if any work on the work order cannot be completed due to Weather conditions, etc. Contractors are to use lead safe work practices whenever required as per EPA rules.
- ❑ If mechanical contractor doing furnace repair work, complete the appropriate sections of the Furnace Form (electric, heat pump, or gas).
- ❑ If mechanical contractor installed a new furnace, complete New Furnace Installation Inspection Form.
- ❑ If mechanical contractor doing water heater repair work, complete the appropriate sections of the Water Heater Form.
- ❑ If mechanical contractor doing gas cook stove and oven repair work, complete the appropriate sections of the Gas Cook Stove and Oven Form.
- ❑ Shell contractor must complete the appropriate section of the Pressure Diagnostics Form 2011. (NEW FORM) Program now requires that pressure tests WRT main body in interior rooms are performed on every home. HVAC/Plumbing contractors must complete if performing any work that will affect the pressure differentials.
- ❑ If any gas appliances are present in the home, run a Daily Safety Test-Out procedure and complete form. If contractor does not have the equipment required to perform the daily safety test out procedures, they must partner with another approved provider of this service. **DAILY SAFETY TEST OUT PROCEDURES MUST BE DONE EVERY DAY BEFORE LEAVING THE PROPERTY. IF THE TEST FAILS AND YOU CANNOT MAKE IMMEDIATE REPAIRS SO THAT TEST PASSES, YOU MUST NOTIFY CLIENT OF THE SITUATION AND EDUCATE THEM ON HOW TO STAY SAFE UNTIL WE RETURN WITH A PERMANENT SOLUTION.**
- ❑ If blower door directed air sealing is on work order, shell contractors **MUST** run Blower Door prior to, during and after all air sealing is completed. Shell must complete information on the Blower Door Testing Results form. IBA expects improvement of: Initial Blower Door Reading + Minimum Ventilation Rate (MVR) divided by 2 = Target Final Blower Door Reading. The average time ordered for contractors for blower door directed air sealing is:

<u>Difference between Blower Door & MVR</u>	<u>Amount of Blower Door Air Sealing Time Ordered</u>
0 to 300	1 hour
300 to 800	2 hours
800 to 1600	3 hours
1600 to 3200	4 to 6 hours
3200+	6 to 8 hours
- ❑ Provide client education and training on any new equipment as appropriate.

FOLLOW-UP

- ❑ **ALL IBA CONTRACTORS MUST USE THE NEW INTELLIGENT FIELD GUIDE FOR ANY JOBS THAT WERE AUDITED AFTER AUGUST 15, 2011. PLEASE CHECK IN THE PRIMARY NOTES (THE GRAYED OUT SECTION) TO FIND OUT WHICH JOBS REQUIRE WHICH SET OF GUIDELINES AND FORMS.**
- ❑ All contractors must completely meet the LEAD requirements identified in Chapter 3 of the Intelligent Field Guide.
- ❑ Whenever 2 part foam is used, the new allowable amount is 1 ½” only. IBA can no longer pay for 3” foam applications.
- ❑ Whenever an exterior chimney is requiring a re-line this must be done with an insulated metallic chimney liner system. Add clearance to combustibles as needed once a liner is installed.

- ❑ Un-insulated ceilings are R-7 or less. Partially insulated ceilings are R-8 to R-19. Insulation is still to be added to meet R-38.
- ❑ IBA Job Notes to be put in Work Order Notes Section - Auditors and contractors must keep IBA abreast of contact with clients and each other through information input into the W.O. Notes section. The latest note should be put at the top of the list and should include date, person reporting, and brief description (i.e. client contacted 6/6/2010 left message; interim scheduled for 6/8/2010).
- ❑ IBA Contractor Reassignment of Jobs IBA may re-assign HVAC, plumbing, electrical, shell, and other contractors for any jobs that are in the same status for more than 5 days where notes do not reflect delay being caused by client.
- ❑ Contractors Request for Changes to Work Order - When a contractor accepts a work order – it is being accepted as is. IBA will no longer accept changes to work orders for items that the company cannot do or doesn't wish to do, or if there are items that a contractor would like to do.

The only change requests that IBA will consider are:

- 1) Deletions for client refusing item. It is highly recommended that the contractor secure a signature from the client acknowledging this refusal. If a client later claims that he/she did not refuse the item, the contractor MUST return and do the item at the CONTRACTORS EXPENSE. Contractor MUST identify deletions on the work order completed submission by identifying quantity and description. Contractor also must identify that changes to work order are necessary in the WO Notes section.
- 2) Deletions for items that are impossible for any contractor to do in the home or should not be done.
- 3) An additional item required to complete an item already ordered on the work order.
- 4) An additional item that the contractor knows would create a situation of gross negligence if not done.

Unfortunately, program guidelines, time constraints, and financial limitations do not allow us to perform every measure that could be done.

- ❑ Contractors need to immediately complete on-line forms, upload forms and notify auditors when they have completed a job.
- ❑ Input materials/brand used, actual quantity installed, and check completed box for each item on on-line work order.
- ❑ Submit the Moisture Assessment Form by itself by uploading the hand-written, signed form in .pdf format directly into the client's on-line file. If you do not have access to upload pdf format, you must fax to 317-245-2142, one client at a time.
- ❑ Submit forms completed above by uploading the hand-written forms as .pdfs in each client's on-line file. If you do not have access to upload pdf format, you must fax to 317-245-2142, one client at a time.
- ❑ Call or e-mail IBA Production Team Manager if any adjustments are needed to work order prior to submitting invoice to IBA.
- ❑ Submit invoice with totals that match on-line work order by uploading invoice directly into the client's on-line file. If you do not have access to upload pdf format, you must fax to 317-245-2142, one client at a time. E-mail Kim@BuildIndiana.org that invoice is on-line.
- ❑ Submit certified payroll information weekly as required on WH-347. PREVAILING WAGES MUST BE PAID.

CALL BACKS

- ❑ Immediately respond to IBA and/or auditors request to return to fix or do additional work in client's home. Future work assignments will be dependent on jobs being completely finished.
- ❑ A \$150 fee per occurrence will be charged back to the contractor for failed interim audits and final audits caused by a contractor not completing the items appropriately that are identified on the work order.

NO HEAT CALL BACK REQUIREMENTS

When a client calls with furnace problems after we have already finished a job. Review the work order to see what work was done to the furnace. If the only work completed deals with cleaning components of the furnace or replacing filters we are not required to go back to this client's home if the final audit has passed. If we have repaired or replaced any components of the furnace we are required to go back to the client's home and honor the contractor's standard warranty period for the replacement parts and labor. This includes new furnace installation and the installation of new thermostats. Please ask the client if they have LP in their tank or if their meter has been pinned. If a new thermostat has been installed please make sure they are in the right setting and that the batteries are good. These follow up questions could prevent a wasted trip.

TECHNICAL UPDATES

- ❑ HVAC must check heat exchangers first to determine if a furnace must be replaced or heat exchanger replaced prior to clean and tune being completed. Photo documentation is required to verify cracked heat exchangers.
- ❑ Leave no items uninstalled in the client's home.