# Deferral of Services

# Weatherization Energy Auditor Single Family

Learning Objectives

By attending this session, participants will be able to:

* Recognize conditions that require deferral of services on a dwelling.
* Recognize conditions that allow for the subgrantee to defer weatherization services, but leave the decision up to the subgrantee.
* Describe procedures for deferral, including information that must be presented in the deferral notice and the clients’ right to appeal.

Key Terminology

Corrective action

Deferral of services

Right to appeal

Subgrantee

Supplemental Materials

Handouts & Resources

Deferral of Services Notification.

Deferral of Services Quiz.

Deferral of Services Quiz Answer Key.

IN WAP Moisture Assessment Findings Form.

Sample Deferral of Services Notification Letter.

Relevant Standard Work Specifications

1.111.2 – Crawlspaces – Pre-work Qualifications.

1.202 – Unvented Space Heaters.

1.401.1 – Air Sealing Moisture Precautions.

Class Overview

* Introduce the rules and guidelines associated with deferring weatherization services to a client.
* During the interactive slides, give the students a chance to determine whether a scenario is a “walk away” or “run away” situation before revealing the answer.
* Hand out the sample Deferral of Services Notification Letter (possibly fill it out as a sample based on locally observed conditions) and have students list the required elements of the letter:
  + The notification is in writing.
  + The form has space to inform client of corrective action and time frame.
  + The letter provides client with contact information for the appeals process.
* Use the Moisture Assessment Findings Form (or a similar, locally-relevant form) to illustrate the proper documentation of conditions that should be part of the client file in case of an appeal.
* Distribute the quiz for this chapter at the end of the lesson. Allow 5–10 minutes for completion, then go through the answers as a class.
* Discuss the unfortunate need for occasional deferral and how knowledge of other local assistance programs provides auditors with information to offer the clients. For instance, if there is a local organization that fixes roofs, the client can get repairs and then re-apply for weatherization.