

# Deferral Documentation Form

## Iowa Weatherization Program

Client Name: \_\_\_\_\_ File Number: \_\_\_\_\_

Address: \_\_\_\_\_ City, Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_  Rent  Own

Although a client may be eligible for the Weatherization Program, there are situations or conditions where weatherization services should be deferred (i.e. delayed or postponed). Usually, those situations or conditions are identified prior to any work beginning on the home. Occasionally, the situation is not identified until the work has already begun.

Deferring work on a dwelling does not mean the dwelling will never be weatherized. If the situation or condition causing the deferral changes, it may be possible to begin or complete the work. For example, a dwelling shouldn't be weatherized if it has a bad roof that leaks or will likely leak. However, the dwelling can be weatherized later if the roof is replaced/repared. Another example is a dwelling undergoing remodeling. The dwelling should not be weatherized while it is being remodeled. However, after the remodeling is completed, the dwelling may be weatherized.

Whenever weatherization is deferred, the agency must clearly explain to the client why the work was deferred, what changes need to occur before weatherization can begin/continue and the responsibility of both parties. The agency must also document the reason for the deferral in the file.

<input type="checkbox"/>	Client refused to sign the Release of Liability and Waiver of Claims Form.
<input type="checkbox"/>	Home is for sale.
<input type="checkbox"/>	Disconnected waste water pipes.
<input type="checkbox"/>	The dwelling has mold or moisture problems (such as pooling water in crawlspaces or standing water in the basement) so severe they cannot be resolved under existing health and safety measures and within repair limits.
<input type="checkbox"/>	Hazardous electrical wiring.
<input type="checkbox"/>	Presence of excessive animal feces and/or other excrements.
<input type="checkbox"/>	Rats, bats, roaches, reptiles, insects, animals, or other vermin inappropriately or not properly contained on the premises.
<input type="checkbox"/>	Unvented combustion appliances.
<input type="checkbox"/>	Cost of repairing or replacing an unsafe appliance is more than the program's allowable repair or replacement expenditure limit.
<input type="checkbox"/>	Dwelling has an unvented space heater which the client has refused to remove from the dwelling.
<input type="checkbox"/>	Dwelling is undergoing remodeling or has unfinished areas which affect the weatherization process.
<input type="checkbox"/>	Dwelling is beyond the scope of the program due to major structural deficiencies in the dwelling.
<input type="checkbox"/>	The mobile home has a heating system other than a heating system that is manufactured for mobile homes and the client refuses replacement.
<input type="checkbox"/>	The mobile home has a fireplace or heating stove that draws combustion air from inside the dwelling and the client refuses replacement.
<input type="checkbox"/>	Client moved or passed away while weatherization services were being provided.
<input type="checkbox"/>	The clients, or other occupants in a dwelling, are uncooperative, threatening or verbally abusive.
<input type="checkbox"/>	The client refuses to allow the agency and/or contractors to enter and/or perform necessary work on certain areas of the home.
<input type="checkbox"/>	Other (explain):

Work required prior to weatherization: \_\_\_\_\_

By signing below, I acknowledge that I have been notified as to the situation or condition that has caused the agency to defer work on my home. I will contact the agency once the above work has been completed. When I contact the agency, I understand that I must still be income-eligible. If I am no longer eligible for the program, my home cannot be weatherized.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Agency Representative: \_\_\_\_\_ Date: \_\_\_\_\_ Phone Number: \_\_\_\_\_