

## HEAP BENEFIT RETURN FORM INSTRUCTIONS

1. Upper left corner – enter name of CAA
2. Upper right corner – enter date of request
3. Vendor name – enter the Vendor who will be returning the funds
4. Return funds by – 15 calendar (not working) days from date of request (a date must be entered; do not enter “ASAP”)
5. Return of funds for Program Year(s) – year(s) the benefit was issued. i.e. PY2017, PY2018, PY2019
6. Amount to be returned – If all funds remaining on account are to be returned, check the box indicating so. If requesting a specific amount, enter the amount in the space provided.
7. Customer/Client Name- Primary Applicant or Household member
8. Delivery Address – address Benefit was issued for (include zip code)
9. Phone number – contact number for the Primary Applicant or Applicant(s)
10. Account number – enter the Household’s fuel account number
11. Reason for return – check the appropriate reason
12. CAA or MaineHousing - Person Initiating Request – full name of person submitting the request
13. Telephone Number – contact number for the person submitting the request
14. Vendor – Person Processing Benefit Return – for Vendor use only
15. Telephone Number – for Vendor use only

After completing the above, copy the form and send to the Vendor. **Leave the “CAA or MaineHousing Use Only” section blank on the Vendor’s copy.**

The “CAA or MaineHousing Use Only” section must be completed prior to sending the Benefit Return Form to MaineHousing.

1. New address (if applicable) - include zip code
2. Fuel type – record the type of fuel **even if it is the same** (i.e. K1, oil, wood, etc.)
3. New Vendor – enter the name of the Vendor to whom the funds should be reissued
4. Account number – enter the Household’s fuel account number
5. Residency Type - indicate whether the Applicant rents or owns
6. Subsidized – check/select yes or no
7. Current Rental Agreement in File – indicate if there is a current rental agreement in the client file (when applicable)
8. Electricity is now included – check/select yes or no
9. Written request from client in file – check/select yes or no
10. Heat is now included – check/select yes or no
11. Tank Location – check/select inside or outside/unheated space
12. Tank Size - Tank Size – enter the size of the fuel tank(s)