

HOME ENERGY ASSISTANCE PROGRAM (HEAP/Fuel Assistance)

**HEAP BENEFIT RETURN FORM INSTRUCTIONS**

1. Agency Name (CAA) - enter name of CAA
2. Date - enter date of request
3. Vendor Name - enter the Vendor who will be returning the funds
4. Location – enter the location of the Vendor (i.e. Dead River – Caribou)
5. Return by – 15 business days from date of request (a date must be entered; do not enter “ASAP”)
6. Return for Program Year(s) – enter the year(s) that the benefit requested to be returned was issued. (i.e. PY2022, PY2023)
7. 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. Note: CAA should only request a specific amount in the case of an Overpayment.
8. Customer/Client Name- enter the Primary Applicant name
9. Delivery Address – enter the address Benefit was issued for (include zip code)
10. Phone number – enter the contact number for the Primary Applicant or Applicant(s)
11. Account number – enter the Household's fuel account number
12. Reason for return – select the appropriate reason (add comments in box, if necessary)
13. CAA or MaineHousing - Person Initiating Request – enter the full name of person submitting the request
14. Phone Number – enter the contact number for the person submitting the request
15. Vendor – Person Processing Benefit Return – for Vendor use only
16. Phone Number – for Vendor use only
17. The “CAA or MaineHousing Use Only” section must be completed prior to sending the Benefit Return Form to MaineHousing.
  - a. New address – enter the Households delivery address including zip code (if applicable)
  - b. Fuel type – enter the type of fuel **even if it is the same** (i.e. K1, oil, wood, etc.)
  - c. New Vendor – enter the name of the Vendor to whom the funds should be reissued
  - d. Location – enter the location of the new vendor (i.e. Dead River-Caribou)
  - e. Account number – enter the Household's fuel account number
  - f. Written request from client in file – select yes or no
  - g. Effective Date – enter the effective date of the change(s)
  - h. Residency Type - select the residency type (rent, own or Roomer/Boarder)
  - i. Subsidized – select yes or no
  - j. Heat is now included – select yes or no
  - k. Electricity is now included – select yes or no
  - l. Tank Location – select the tank location (inside, outside or unheated space)
  - m. Tank Size - Tank Size – enter the size of the fuel tank(s)
  - n. New Heating System Location – enter the location of the new heating system (if applicable)
18. *After completing the above, **upload the Benefit Return (BR) Form to HEAP Cloud and send liheap@mainehousing.org an email that includes BR and the client number in the subject line.***