HOME ENERGY ASSISTANCE PROGRAM (HEAP/Fuel Assistance)

HEAP BENEFIT RETURN FORM INSTRUCTIONS- CAA

A Benefit Return is the return of funds to MaineHousing for all or part of a payment made to the Vendor on behalf of a Household. Benefit Returns must be initiated by the CAA for the following reasons:

- when CAA becomes aware of a change in the Household's situation that warrants a Vendor change
- when Applicant applies for the new/current Program Year and there is a change in the Households situation resulting in a Vendor change
- when CAA becomes aware of an overpayment
- when CAA becomes are that a sole household member has deceased

1. If the funds being returned to MaineHousing will be reissued, the CAA must obtain a written request and supporting documentation from Applicant. The written request **must** be one of the following:
    a. Application Update Form; **or**
    b. Signed Application for the new/current program year

2. CAA must make the appropriate changes in HEAP Cloud following the guidance of the HEAP Handbook:
    a. Section 30: Application Changes
    b. Section 31: Change of Vendor (Benefit Return)

3. CAA must complete a Benefit Return Form and upload document to the Document Section of the HEAP Cloud Application for the appropriate Program Year.

4. CAA **must** email liheap@mainehousing.org informing MaineHousing of the Benefit Return situation.
    a. The email subject should include 'BRF' and the client number.
    b. CAA may add text to the body of the email if clarification is necessary. However, there should be no PII (Personally Identifiable Information) in the email so that it does not need to be encrypted.

5. **To complete the Benefit Return Form:**
    a. Agency Name (CAA) - enter name of CAA
    b. Request Date - enter date of request
    c. Vendor Name - enter the Vendor who will be returning the funds
    d. Location – enter the location of the Vendor (i.e. Dead River – Caribou)
    e. Return by – 15 business days from date of request (a date must be entered; do not enter "ASAP" or other text)
    f. Return for Program Year(s) – enter the year(s) that the benefit requested to be returned was issued. (i.e. PY2023, PY2024)
    g. 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.
    h. Customer/Client Name- enter the Applicant name
    i. Delivery Address – enter the address Benefit was issued for (include zip code)
    j. Phone number – enter the contact number for the Applicant or Applicant(s)

k. Account number – enter the Household's fuel account number

l. Reason for return – select the appropriate reason (add comments in box, if necessary)

m. CAA or MaineHousing - Person Initiating Request – enter the full name of person submitting the request

n. Phone Number – enter the contact number for the person submitting the request

o. Vendor – Person Processing Benefit Return – for Vendor use only

p. Phone Number – for Vendor use only