

## Wisconsin Home Energy Assistance Program (WHEAP) Vendor Refund Policy

1. Credit Balances:
  - a) If no change occurs in the residence of the WHEAP recipient and the recipient retains the same supplier with an active account, the credit balance of WHEAP funds remains with the Vendor until exhausted.
  - b) In the event there is a balance of WHEAP funds remaining on an account AND the account becomes inactive, AND the Vendor is unable to locate the customer, the balance of the funds is to be returned, by check, to the Division by the end of each program year (September 30) or upon Division request. The returned check shall include all information listed in item number four of this Refund Policy.
2. Customer Moves:
  - a) If the WHEAP recipient changes energy providers, fuel type or moves to another residence within the state and has a relationship with a new energy provider, the Vendor holding the credit balance of the WHEAP payment(s) must transfer the balance to the new energy provider (Vendor) or new account.  
EXCEPTION: In the event a WHEAP recipient changes electric providers and the new electric provider is not a participant of the State of Wisconsin Public Benefit program, any non-heating electric credit balance is to be returned to the Division with the information listed in number four of this Refund Policy.
  - b) When a WHEAP recipient moves their household and as a result the recipient has no direct relationship with a Vendor, the following must occur:
    - Any credit balance of regular heating is to be transferred by check or cash to the WHEAP recipient.
    - Any credit balance of regular PB payments and/or crisis payments is to be returned by check to the Division with the information listed in number four of this Refund Policy.
  - c) When a WHEAP recipient moves out of Wisconsin any credit balance of regular heating payments is to be transferred to the recipient within 30 days of the move. In the event an out of state forwarding address is unavailable, the Vendor must follow the procedures listed in 1b of this Refund Policy. Any balance of regular PB payments and/or crisis payments shall be returned by check to the Division with the information listed in number four of this Refund Policy.
3. Deceased Recipient - In the event a credit balance remains, the vendor shall make any remaining credit balance available to any other eligible household members for 45 days. The executor of the customer's estate may claim the credit balance within this 45-day period. If the credit is not claimed within 45 days' notice of the customer's death, the credit balance will be refunded to the program by submitting a check to the Division with the information listed in number four of this Refund Policy.
4. Return Address for Refunds to the State of Wisconsin - Mail refunds to:

DOA/DIVISION OF ENERGY, HOUSING AND COMMUNITY RESOURCES  
ATTN: WHEAP REFUND  
PO BOX 7970  
MADISON WI 53707-7970

Refunds must include the following information: Customer name, Customer address, Date of WHEAP payment to Vendor, Reason for the return, Type of funds (for example: regular heating, regular PB and/or Crisis)
5. Supplemental WHEAP Payment – In program years where the Division releases a “Supplemental” WHEAP payment, it shall be treated as part of the original benefit of the current program year. If the supplemental benefit issues a credit on the customer's account, the remainder of the Supplemental payment may be applied to arrearages.
6. Incorrect Payments – All Vendors are required to review WHEAP payment registers for accuracy of Home Energy Plus payments. In the event a payment is made in error, the Vendor shall contact the Division within 30 days to correct the error. Payments made in error are refunded from subsequent WHEAP payments made to the Vendor.