



Handling Payments & Refunds in eHEAT when a Household Moves

When a household moves within Service Provider's area

The vendor refunds any remaining EAP benefit in eHEAT so the Service Provider can re-direct the payment to the household's new vendor.

1. Go into manage payment to remove schedule and then cancel any remaining payments.
2. Go to "**Client Services**" to update address, member, housing type, fuel type and vendor information. Make notes in eHEAT regarding the change. Include previous household number, date of change, staff person who made the change and other information as appropriate.
3. Go to "**Payment Services**", search for the household, manage the payment, choose new vendor and save.

When a household moves to an unknown location

1. Remove schedule
2. Void payments (which will de-obligate the money)

When a household moves from another Service Provider

1. Go to "**Client Services**" to update household and vendor information as appropriate.
2. If they have an EAP balance remaining, make payment to their new vendor(s) by:
3. Go to "**EAP Benefit**", select the household and click "**Make Primary Heat payment.**"
4. Finally, go to "**Payment Services**", search for the household, manage the payment, choose new vendor and save.

For the application that remains open update the information as appropriate:

- Household member information (add new member information and deactivate those who are no longer in the household)
- Address
- Housing type
- Fuel type
- Vendor information including
 - Vendor name
 - Account number
 - Consumption: all consumption should be invalidated except the one for the current dwelling
- Document in the notes section in eHEAT, including previous household number, date of change and staff person who made the change.