

EAP Vendor Training PY2026

October 2025

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Vendor Analyst

TODAY WE WILL COVER

- Updates for PY2026
- Common questions and issues
- Contact protocols
- Q&A

EAP PROGRAM TIMELINE PY26

EAP ASSISTANCE SEASON	
Key Dates	Purpose
October 1, 2025	<p>Beginning of Program Year 2026</p> <p>Online application opens to the general public at 8:00 AM Eastern time.</p>
November 1, 2025	<p>In-person appointments may begin.</p> <p>Transmittals may be sent to utility vendors.</p> <p>Applicant Notification letters may be sent to clients.</p>
December 1, 2025	Start of Moratorium Protection.
March 15, 2026	End of Moratorium Protection at 11:59pm.
April 20, 2026	End of EAP application period at 5:00pm Eastern time.
May 4, 2026	All incomplete EAP applications must be fully processed.
May 18, 2026	Last day to submit transmittals.
June 1, 2026	All vendors must be fully reconciled.

HOT TOPICS

- Federal Government Shutdown: IHCDa will continue normal business operations. IHCDa's office remains open and the agency will continue to accept federal program draws and process claims. At this time, no significant disruption of services is anticipated. IHCDa will continue to communicate with program partners and stakeholders.
- No longer using Community Family Service (CFS) for EAP
 - Surrounding agencies picking up outreach in these counties
- 2-1-1 No longer accepting applications telephonically
- Reminder: first transmittals November 1st, and first payments in December

PILOTING NEW LITT SYSTEM FOR EAP

- Piloting former CFS territory in new LITT system
 - Adams, Blackford, Huntington, Jay, Randolph and Wells Counties
- Training and onboarding into new system is coming this week
 - Invites out after training
 - Training and onboarding will be ongoing
- All other counties and utilities will continue using legacy EAPConnect system
- Expect a full onboarding, trainings and all kinds of information next summer

QUESTIONS?





COMMON QUESTIONS & ISSUES

CREDIT BALANCES

Maximum Credit balance reductions

- Bulk Deliverable fuel utilities: \$500+ credit balance makes client ineligible for benefit dollars
- Clients can return to their local agency once they've fallen below the maximum credit balance

OVERPAYMENT AND REFUND SUMMARY FORM

Vendors now required to include Overpayment and Refund Summary form while returning funds

- Using these forms will make it easy and uniform for all Vendors to provide the information required with refunds
- Using these forms will immensely help our claims and fiscal staff in tracking and accounting for the returned benefits, while ensuring the funds are applied to the correct grant
 - This aims to reduce the waste of public taxpayer funds
- Using these forms will speed up benefit transfers when an applicant moves and has their benefit sent to a new utility or fuel provider
- Found on our resource page

OVERPAYMENT AND REFUND SUMMARY FORM



Vendor name: _____
Date: _____

Check number: _____
Remittance type (check one): ☐ Overpayment ☐ Refund

Energy Benefit Transfer Refund?	Account number	Applicant Name	Awarding Agency	Original Transmittal Number	Date Account Closed	Amount Awarded	Amount refunded
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							
<input type="checkbox"/> Yes <input type="checkbox"/> No							

\$ -

UNALLOWABLE EXPENSES

EAP funds may not be applied to:

- Deposit fees
- Commercial/business accounts
- Garbage, Water or sewer bills
- Unsafe heating devices (portable device, stoves, etc)
- Service or insurance plans
- Repayment of fraud or theft losses
- Tampering charges
- Setting an LP tank
- Optional services or any expense not directly related to residential energy consumption or delivery

EAP funds must provide continuing service

- A Vendor may not accept EAP funds for a closed or inactive account and apply them to an outstanding amount owed, unless the account will be restored

This list is not exhaustive!

NOTE FOR BULK FUELS

- Vendors should work with their clients to maximize the EAP benefit
 - Ex. Encouraging clients to take full deliveries during business hours to avoid unnecessary fees and charges.
 - Exceptions should be made in crisis deliveries

COOPERATION

- By signing the MOA, the Vendor agrees to cooperate with IHCDa and the Local Service Provider (LSP) regarding sharing information about EAP applicant accounts, including:
 - Energy consumption and cost
 - Payments
 - Disconnection prevention and restoration of service
 - Arrearage amounts
 - Account status
 - Other data related to EAP
- Clients sign waiver, and that language can be shared on request
- Collection of this data is federally mandated



QUESTIONS?

TRANSMITTAL PROCESS



TRANSMITTAL PROCESS

- Transmittals serve as the official record of the benefit for which a client has been approved
 - If there is a discrepancy between the pledge received via LSP contact and the amount on the transmittal, the transmittal amount will be considered correct
 - Transmittals are not valid for payment until they have been signed by both a representative of the LSP and a representative from the Vendor
 - Any changes made to the transmittal need to be made prior to execution
- All LSPs have been instructed to ensure that transmittals are generated and sent on at least a weekly basis

TRANSMITTAL PROCESS

- It is the Vendor's responsibility to fully review the transmittal before signing it
- This review should include:
 - Ensuring that the client is a customer of the utility
 - Ensuring that the name, service address, and account number is correct
 - Ensuring the account is currently active and is not scheduled for disconnection at the customer's request
- If there are any errors or any accounts that need to be removed, it is the Vendor's responsibility to mark these changes directly onto the transmittal report and adjust the total amount, if necessary, before signing and returning the transmittal report to the LSP
- Vendors are required to return transmittals within 7 days
- Pledges must be applied at the time of transmittal. Some Vendors have agreements with their LSP to deliver fuel at the time of the pledge. We support this show of compassion for your customers

TRANSMITTAL PROCESS

- If an LSP discovers an error has been made in benefit or eligibility determination, the LSP may award the client additional funds or submit a negative transmittal accompanied by an overpayment remittance
 - The LSP may award additional funds at any time
 - Overpayment remittances must be submitted within 60 days of initial approval
 - If an overpayment remittance is received more than 60 days following initial approval, you may inform the LSP that the window to request overpayment remittance has lapsed

TRANSMITTAL PROCESS

- When a Vendor receives a negative transmittal, they are to follow the same transmittal procedure
- After returning the signed negative transmittal to the LSP, the Vendor will also sign the overpayment remittance
- The signed overpayment remittance is to be sent with a check to IHCDA to be reinvested in the program
- Vendors are justified to pass charges onto customer after returning any funds

An overpayment occurs because:

1. An applicant was accidentally awarded more funds than they were actually eligible for under the program rules
2. They were approved for benefits when they were in fact not eligible

Therefore, any delinquency caused by the removal of an overpayment from the customer's account becomes the customer's responsibility to pay

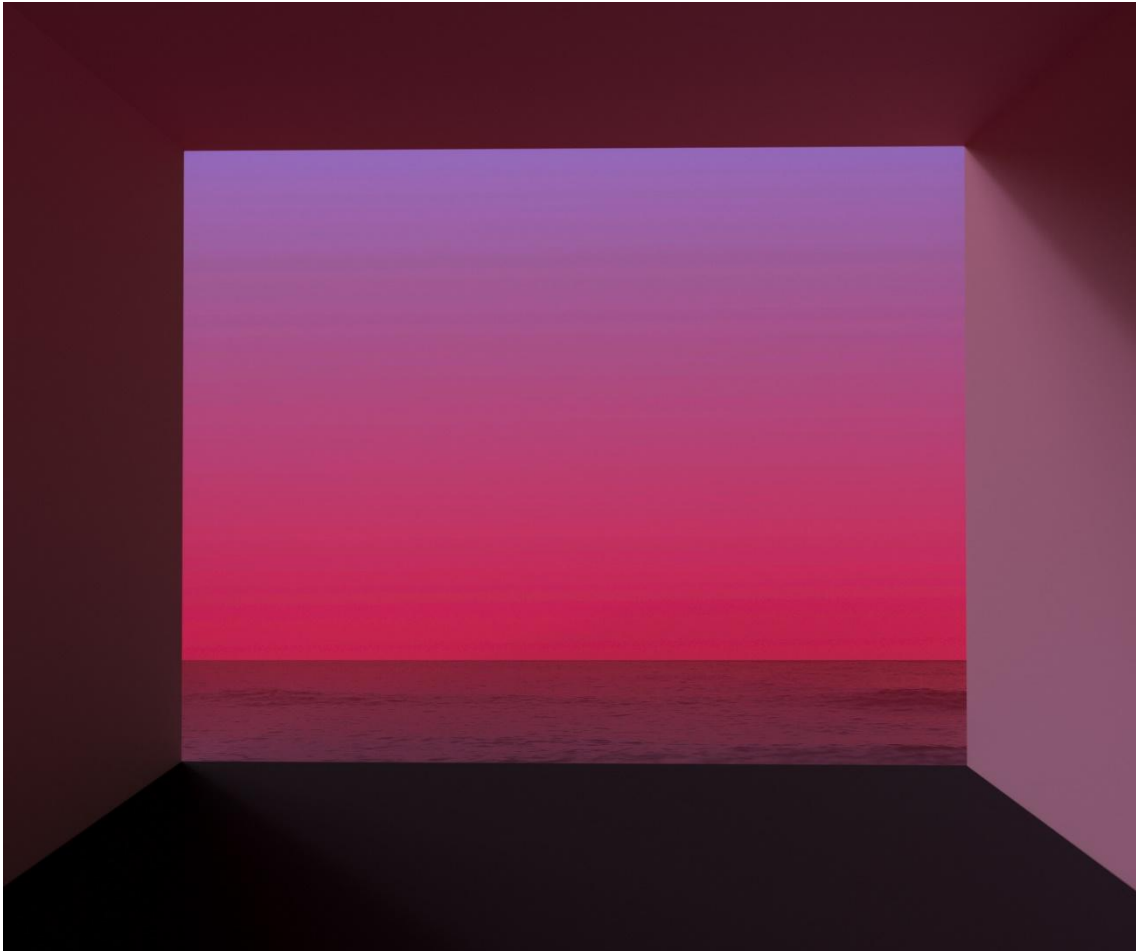
TRANSMITTAL PROCESS

- In order to keep payments on time and not negatively impact customers/clients, we are asking **all Vendors to return signed transmittals to LSPs within one week of receipt**
- Claim notification e-mails will note which transmittals have been approved for payment and the total of each transmittal (Reset@ihcda.in.gov)
 - Please use these e-mails in conjunction with the transmittal reports for the purposes of correctly distributing funds and reconciling claims
- **Please remember that no LIHEAP funds are ever to be released back to the customer**
 - All unused funds are to be sent back to IHCDA within 60 days of account closing



QUESTIONS?

















THE VENDOR PORTAL



VENDOR PORTAL

- The Vendor portal allows all transmittals to be sent, edited, signed, returned and monitored **all online**
- New transmittals send a notification email
- Training guides available
- Email vendors inbox for access or help
- Final program year for this system

Vendor Management

Vendor Name	Vendor Code	Is Active	Is Electric	Is Heating Fuel	Is Bulk Fuel	Is Water	Utility Type	Does Transmittals
 AEP - REAL	1002	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input checked="" type="checkbox"/>
 All Pro Gas Potato	1072	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Non-Regulated	<input checked="" type="checkbox"/>
 Amerigas (Rochester)	1015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Non-Regulated	<input checked="" type="checkbox"/>
 Amerigas Goshen	2183	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Non-Regulated	<input type="checkbox"/>
 Bremen, Town of	1062	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input type="checkbox"/>
 Chipendales Apple Cores	7797	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input checked="" type="checkbox"/>
 Citizens Gas	4022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input checked="" type="checkbox"/>
 Dani's duplicate	9992	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input type="checkbox"/>
 Duke Energy	4082	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input checked="" type="checkbox"/>
 New duplicate	9991	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other	<input checked="" type="checkbox"/>
 New State Vendor	1123	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input checked="" type="checkbox"/>
 NIPSCO - REAL	1046	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input checked="" type="checkbox"/>
 SELF PAY	9999	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
 SELF PAY	9000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Self Pay	<input checked="" type="checkbox"/>
 Stephanie's Bottle Gas	1235	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other	<input checked="" type="checkbox"/>
 Vectren Energy Delivery North	8863	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Regulated	<input checked="" type="checkbox"/>

VENDOR GUIDE & RESOURCES



VENDOR GUIDE

- Vendor Guide, all training powerpoints and videos are online
- Vendors are encouraged to consult the Vendor Guide first when they have a question about policy or procedure
 - Perfect for new participants or common questions
- Found here on our IHCDA resource page:
 - <https://www.in.gov/ihcda/program-partners/energy-assistance-program-eap/utility-vendors/>

VENDOR MONITORING & PERFORMANCE MEASURES



WHAT IS VENDOR MONITORING?

- The purpose of Vendor Monitoring is to ensure compliance with the LIHEAP program by the Utility Vendor
 - It is also an opportunity to improve processes and lets us know where areas of confusion or additional assistance are needed
- Vendor monitoring is a federally mandated component of the LIHEAP Statute as indicated on the MOA
- All Vendors that participate in the State of Indiana's LIHEAP are subject to Vendor Monitoring
- Monitoring will be conducted as a desktop review by the Vendor Analyst

VENDOR MONITORING PROCESS

Vendors will be sent a 30-day letter notifying them of when the session is to begin.

Vendors will be required to submit requested documentation prior to the start of the monitoring session.

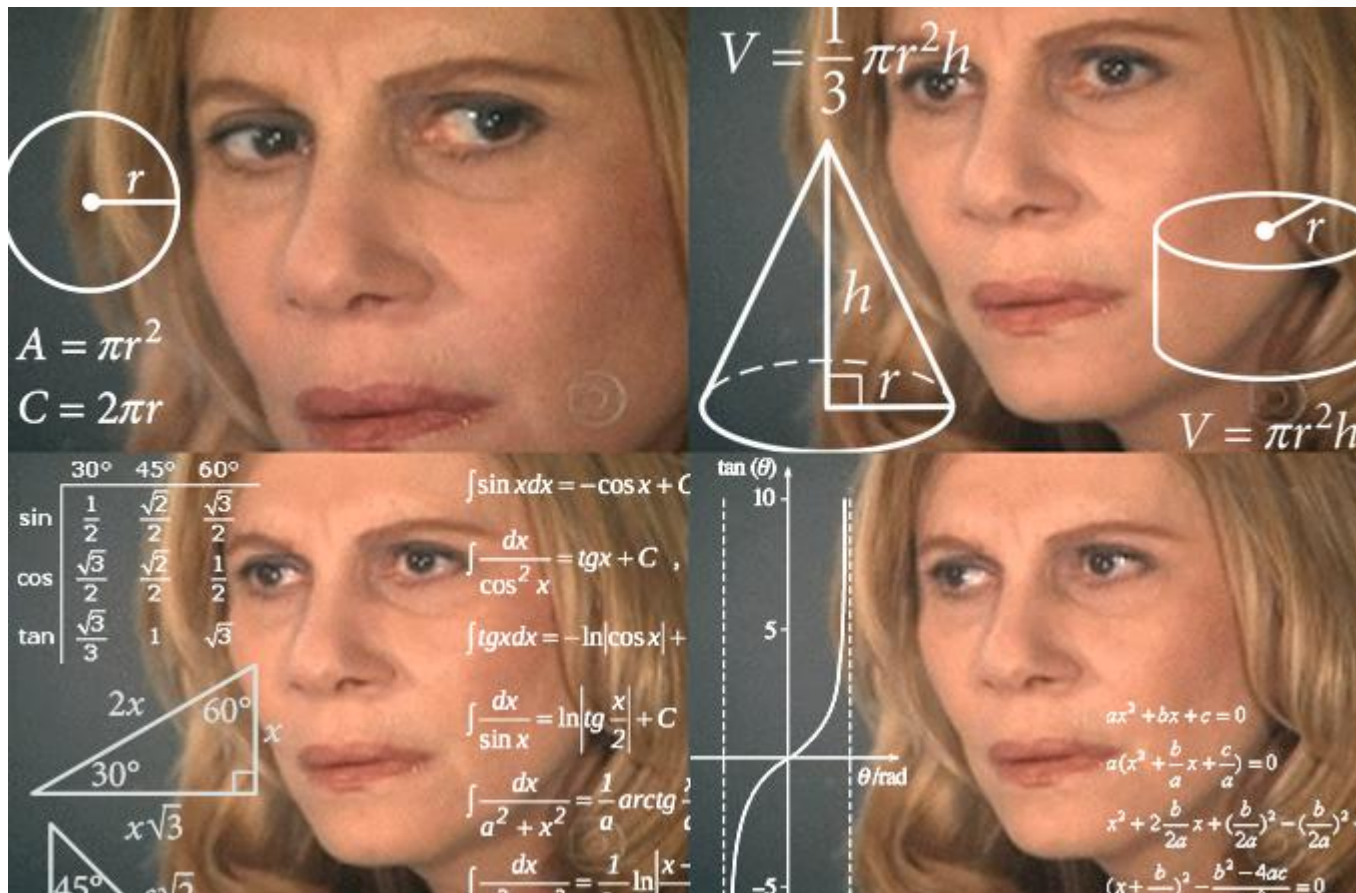
Vendors will be required to complete an Energy Utility Supplier Survey.

All vendors being monitored will receive an Assessment Completion Report within 30 days of IHCDa completing the desktop review.

VENDOR BEST PRACTICES

- Create written processes to promote consistency and program integrity
- Perform internal quality assurance audits on EAP customer accounts
- Vendors should create a system to ensure that unallowable expenses are not being paid using EAP funds
- Vendors should create a three (3) year record retention and destruction policy for all EAP documentation including electronic documentation
- Vendors should strive to meet all reporting deadlines
 - This allows IHCDCA to fulfill Federal Reporting requirements and make effective program changes
- Putting EAP information on their websites (please update!)

PERFORMANCE MEASURES



PERFORMANCE MEASURES

- **Collection of performance measures data is mandated by the LIHEAP statute**
- Every year, we ask several Vendors to submit performance measures data, which includes providing annual energy usage and cost for all customers who have received LIHEAP benefits to cross-reference this data with our annual income calculations
- The purpose of performance measures data is to:
 - Demonstrate a reduction of energy burden
 - To assist IHCDa in crafting policy

QUESTIONS?



WHO SHOULD I CONTACT?



WHO SHOULD I CONTACT?

LSP

- Questions about a specific client/household
- Questions about a benefit
- Questions about submission of transmittal
- Confirming application status
- Notification of suspected customer meter tampering or unauthorized use when the customer is an EAP client or applicant

IHCDA

- Questions about payment that you are unable to answer after review of your transmittals and claim approval e-mails
- Questions about moratorium or MOA terms
- General issues with LSPs
- Follow-up on a refund or Energy Benefit Transfer
- Suspicion of fraud/misconduct at LSP level

Assistance for Clients

- All referrals to LIHEAP from the vendors should be made to the appropriate LSP or 2-1-1.
- 2-1-1 for general assistance
- Customers may be referred to <http://eap.ihcda.in.gov> for more detailed information or to apply online.

CONTACT PROTOCOLS

- Clients should **never** be referred directly to IHCDa by either phone or email
- Dedicated Vendor inbox: vendors@ihcda.in.gov
 - You may still hear from eap@ihcda.in.gov
- If in doubt, loop IHCDa in

Q & A

Questions or concerns, please reach out to vendors@ihcda.in.gov

THANK YOU

Thank you for attending this training and your hard work for Hoosiers!

- Training recording and Powerpoint cards will be shared out and hosted on the IHEDA resource page