2025-2026 Upgrade & Save North Carolina Energy Efficiency and Safety Rebate Program 2025-2026

2025-2026 NCPCM Heating Fuels Committee

Heating Oil Tank & Appliance Installation Rebate Program Rules

Tank & Appliance Rebate shall be approved before the purchase/installation of the fuel oil equipment via web site portal: http://upgradeandsavenc.com.

Eligibility: Begins on September 1, 2025 ends May 31, 2026 (or until funds are depleted)

A. NC Fuel Oil Dealer & non-NCPCM members Pre-approval is required per http://upgradeandsavenc.com website portal. NC Fuel Oil Dealer must register and have password & username to access the rebate program website.

Only North Carolina Fuel Oil Dealers are eligible to participate. **The program is not available to the public except through a NC Fuel Oil Dealer.** The NC Fuel Oil Dealer is responsible for documenting that an eligible installation has been performed, that all eligible appliances are new and have been identified. Applicant has 30 business days to complete rebate & installation. ***YOU MUST SECURE PRE-APPROVAL FOR EACH REBATE & PRE-APPROVAL REBATES WILL EXPIRE AFTER 30 DAYS. (SEE ITEM J. below for limited monies from CFI Funds for NCPCM members)***

REBATE CHECKS ARE ONLY PAYABLE TO NC FUEL OIL DEALER PER HTTP://UPGRADEANDSAVENC.COM.
No direct-to-consumer payments. Commercial Business are excluded from rebates.

NC Fuel Oil Dealers are responsible for submitting the following to the Upgrade & Save NC web site portal:
1. FULLY COMPLETED *NCPCM Rebate Portal from http://upgradeandsavenc.com or linked to www.ncoilheat.org web site. (Tank or Appliance Rebate Form)*
2. Upload Appliance Invoice Receipt & Heating Efficiency Improvements.

B. Applicant

The applicant is described as a consumer (owner of the residence or business where the appliance is installed). Applicants must receive a rebate through a participating NC Fuel Oil Dealer and must agree to the regulations and conditions. Applicants must use an NC licensed HVAC or plumbing contractor.

C. Eligible Installation of Upgraded Efficiency Water Heaters/Boilers

The program authorizes a **$1,000.00** rebate to the owner for the safe installation of a new, approved, higher efficiency fuel oil conventional water heater or boiler in a new residential or commercial building or to replace any existing low efficiency water heater/boiler in a residential or commercial building. The safe installation must take place on real property located in North Carolina or within the trade territory normally served by the participating NC Fuel Oil Dealer location. Approved water heaters/boilers are defined as a fuel oil-dedicated fueled water heater or boiler. The eligible applicant must be in good standing with the participating NC Fuel Oil Dealer.

Additionally, the program authorizes a **$500.00** rebate to a NC licensed HVAC or plumbing contractor for the safe installation of a new, approved, higher efficiency fuel oil-fueled conventional water heater or boiler in a new residential or commercial building or to replace any existing water heater/boiler in a residential or commercial building.

C-1: The "Heating Oil Tank Replacement Fund" program is for low income families (residential & Church) with old tanks. Commercial/Industrial facilities are excluded from tank rebate funds. Fund will not be used to install new USTs. Fund will only be used to replace questionable ASTs or USTs with new ASTs. Must provide NORA Tank inspection form filled in by NC Fuel Oil Dealer. The NORA Forms are "Routine Fuel Oil Storage Tank Evaluation – In ground tanks" & "Routine Fuel Oil Storage Tank Evaluation–Above Ground Tanks." Forms can be downloaded at: *http://upgradeandsavenc.com*.

After inspection by marketer using one of the attached forms for (USTS/ASTS), NC NORA would provide **$1,000.00** rebate for tank replacement upon submittal of proper form(s) and invoice for new tank.

C-2: YOU MUST STATE EQUIPMENT EFFICIENCY (AFUE) AS SHOWN IN WEB SITE. FAILURE TO DO THIS WILL VOID REBATE. Must enter Annual Fuel Utilization Efficiency (AFUE) on the equipment from the manufacture. You can call/web search Manufacture for existing AFUE if not shown or indicate the date the existing equipment was installed if equipment does not have manufacture data. Please note the serial and model numbers of the existing equipment. Thermal Efficiency combustions testing is acceptable on both units instead of AFUE.

Efficiency rebates will not be honored if new equipment does not have greater efficiency of existing/replaced equipment.

D. Eligible Installation of Upgraded Efficiency Heating Oil Furnaces-Central Heating System

The program authorizes a **$1,000.00** rebate to homeowner for the safe installation of a new authorized higher efficiency fuel oil fueled, ducted, central heating system in a new, residential or commercial building or to replace any existing lower efficiency ducted, central heating system in a residential or commercial building. Includes vented Kerosene heaters. The above referenced system must be the primary source of heat in a primary residence. The safe installation must take place on real property located in North Carolina. The eligible applicant must be in good standing with the NC Fuel Oil Dealer.

Additionally, the program authorizes a **$500.00** rebate to an NC licensed HVAC or plumbing contractor for the safe installation of a new higher efficiency authorized fuel oil fueled, ducted, central heating system in a new, residential or commercial building or to replace any existing lower efficiency ducted, central heating system in a residential or commercial building.

E. Limits

No More than twenty five (25) FUEL OIL APPLIANCE installation rebates to any single NC Fuel Oil Dealer Firm.
No More than twenty five (25) FUEL OIL ABOVEGROUND TANK installation rebates to any single NC Fuel Oil Dealer Firm.

No more than two (2) installation rebates will be paid per residence or business (profit or non-profit). The North Carolina Petroleum & Convenience Marketers may limit the total number of rebates paid to an applicant. The NCPCM Heating Fuels Committee reserves the right to change the terms and conditions at any time to safeguard original intent of the appliance installation rebate program.

F. NCPCM Staff Approval of Rebate Forms

NCPCM staff will approve each application individually. Data missing on an application may delay or disqualify the application. False or misleading information may disqualify an applicant or suspend an NC Fuel Oil Dealer from the program. Within thirty (30) days after the NCPCM suspends or declares an applicant or NC Fuel Oil Dealer ineligible, they may appeal the action by submitting the appeal in writing to the NCPCM at 7300 Glenwood Avenue, Raleigh, N.C. 27612. Attention Mr. Gary Harris. Actions taken by the NCPCM Heating Fuels Committee with respect to such appeals will be final.

G. Verification

A site inspection, conducted by or on behalf of the NC Fuel Oil Dealer, must be conducted prior to the submission of any rebate application. An appropriate inspection consists of an on-site inspection, review & documentation of Building Code Installation Permit, for the purpose of verifying that the heating oil equipment system, including all equipment, is or was installed in compliance with the North Carolina Building Codes and/or NFPA 31 and is in safe operating condition. Only new appliances are eligible for rebates and a paid invoice must accompany the application. NCPCM staff may choose to spot check random installations for quality control of program.

H. Applications

To apply for the rebate, the application must be accessed through the http://upgradeandsavenc.com web site forms. All requested information must be provided along with the necessary documentation. To start the rebate program, an applicant needs to contact an authorized NC Fuel Oil Dealer to obtain a rebate request. The NC Fuel Oil Dealer will log into http://upgradeandsavenc.com & confirm that rebate monies are available, before offering the rebate. NC Fuel Oil Dealer offers their company's services in replacing the water heater, furnace/boiler, or tanks, or can make suggestions for purchases and installations from licensed/certified HVAC/Plumbing contractors. Purchase location preferences are up to the applicant. This rebate is not affiliated with any other HVAC rebate programs.

I. ALL NORA Rebate Paymenst to NC Fuel Oil Dealer

The applicant must obtain an installation document and inspection detailing each installation to accompany the application. The NC Fuel Oil Dealer must log in & post on ***http://upgradeandsavenc.com/ or linked to www.ncoilheat.org web site***. Posting must be done within thirty (30) days of the date of the inspection. Allow 6-8 weeks for receipt of the rebate check. **The expiration of the rebate program is May 31, 2026, or while funds are available. Limited time offer**.

J. Monies exclusively funded for rebates by the Carolina Fuel Institute (CFI) will only be provided to main members of the NC Petroleum & Convenience Marketers Association (NCPCM)

Funds open to all NC Oil Companies are generated from the National Oilheat Research Alliance (NORA); 600 Cameron Street; Alexandria, VA 22314; Phone: (703) 340-1660; Website: http://noraweb.org.

DISCLAIMER:

The NC Fuel Oil Dealer seeking a rebate must submit a full and complete Application form. Submission of the Application form constitutes a representation on the part of the participating NC Fuel Oil Dealer that the work shown on the form has actually been completed. A validation inspection must be performed by the participating NC Fuel Oil Dealer after the installation of each new qualifying tank(s) and the result of that inspection must be documented on the Application and Tank Inspection Form. The NC Fuel Oil Dealer agrees to comply with all laws, rules, and regulations governing the installation of the qualifying residential fuel oil tanks and with the manufacturer's installation instructions & NC Building Codes. The NC Petroleum & Convenience Marketers assumes no responsibility whatsoever for the installation, inspection, permitting or testing of the qualifying tank(s) or any associated oil storage/piping system and, by issuing a rebate, makes no representation, warranty or guarantee regarding the qualifying tank(s) or the associated fuel oil storage/piping system. This rebate will not pay for tank-piping removal. The NC Petroleum & Convenience Marketers disclaims any liability for any personal injury, property damage, business losses, or other damages of any nature whatsoever, whether special, indirect, consequential, or compensatory, directly or indirectly arising from the installation of the qualifying tank(s). Furthermore, NCPCM is not liable for existing site/tank conditions or removal of ASTs or USTs from site. This rebate is not affiliated with any other rebate programs. For additional information please contact Tim Laughlin at 919-782-4411, Cell Phone; 919-801-4271 or email tlaughlin@ncpcm.org.

NCPCM North Carolina Petroleum & Convenience Marketers

Upgrade & Save

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