



2018 PPA/BSOHA/BHHCLV REBATE PROGRAM

Heating Oil Appliance Installation Rebate Program Rules

The UPGRADE AND SAVE – PA Energy Efficiency and Safety Rebate program will promote and facilitate the installation of higher-efficiency oil-fueled heating equipment and safety-reinforced aboveground heating oil storage tanks in existing properties in Allegheny, Armstrong, Beaver, Berks, Butler, Carbon, Clarion, Columbia, Crawford, Erie, Fayette, Forest, Greene, Juniata, Lawrence, Lehigh, McKean, Mercer, Montour, Northampton, Northumberland, Potter, Schuylkill, and Snyder. The 2018 Upgrade & Save PA program is a joint initiative between the Berks-Schuylkill Oil Heat Association, the Better Home Heat Council of Lehigh Valley and the Pennsylvania Petroleum Association. The PPA will manage the program on behalf of both organizations, according to these Program Rules. Rebates will be available for new equipment installations and for replacement/efficiency upgrades of existing equipment. Research has shown that property owners with new, higher-efficiency heating equipment are more satisfied with their comfort level and fuel choice. The UPGRADE AND SAVE – PA Energy Efficiency and Safety Upgrade Rebate Program has been developed in accordance with the NORA 2017-2018 budget and the mandated allocation of funds.

Appliance Rebate must be approved before the purchase and installation of the fuel oil equipment.

Eligibility:

All PA Oilheat dealers are eligible to participate, regardless of affiliation with the PPA, BSOHA, or BHHCLV. The program is not available to the public except through a local Oilheat Dealer with a current, valid Pennsylvania Home Improvement Contractor number. The dealer is responsible for documenting that an eligible installation has been performed, including Customer Rebate Acknowledgement Form.

REBATE CHECKS WILL BE PAID DIRECTLY TO THE APPLICANT/PROPERTY OWNER

Oilheat Dealer is responsible for submitting the following to PPA:

- 1. FULLY COMPLETED Rebate Form on UpgradeAndSavePA.com or downloaded and mailed to PPA at 911B South Eisenhower Boulevard Middletown, PA 17057**
- 2. Customer Rebate Acknowledgement Form with the homeowner's signature.**

A. Applicant

The applicant is described as a consumer (owner of the residence where the appliance is installed). Applicants must request the rebate through a participating Oilheat Dealer and must agree to the regulations and conditions on the application form. The applicant must sign the application.

B. Awards: Eligible Equipment

The program authorizes the dealer to offer a \$250.00 rebate for the installation of a new, higher-efficiency oil-fired boiler or furnace or a \$250.00 rebate for the installation of an aboveground oil storage tank in a residential building or to replace any existing aboveground or underground Oilheat storage tank. The installation must take place on real property located in on of the counties listed in the program rules above and within the trade territory normally served by the participating Oilheat Dealer location.

C-1. YOU MUST STATE EQUIPMENT EFFICIENCY (AFUE) AS SHOWN IN THE TABLE ON THE REBATE FORM.

FAILURE TO DO THIS WILL VOID REBATE.

Dealer must enter Annual Fuel Utilization Efficiency (AFUE). If existing equipment does not have manufacturer data, please provide an estimate of when the existing equipment was installed. Please note the serial and model numbers of the existing equipment. Thermal Efficiency combustion testing is acceptable on existing equipment instead of AFUE. Efficiency rebates will not be honored if the new equipment to be installed does not have a greater efficiency than the existing/replaced equipment. Efficiency rebates will not be honored if existing/replaced equipment and new equipment efficiencies and/or model numbers/serials and/or date installed are not listed in the table on the rebate form.

C. Limits

- No more than 1 rebate per residence address
- Dealers will have a maximum value of rebates proportionate to their annual fuel sales in relation to the regional sales.
- Dealers may offer the homeowner rebates of \$250.00 for a new boiler or furnace or \$250.00 for a new aboveground storage tank.
- Maximum value of rebates to any home address cannot exceed \$250.00
- Offer of higher value rebates will reduce the number of available rebates for future sales.
- Rebates will be made available on a first-come, first-served basis, subject to availability of funds
- Maximum allowance is not a guarantee of rebate availability
- BSOHA, BHHCLV and PPA reserve the right to change the terms and conditions at any time to safeguard original intent of the rebate program.
- If rebate dollars that are allocated to registered companies are not used by September 1, 2018 they will be reallocated on a first come first serve basis.
- Participating companies will have until December 31, 2018 to use any funds that were previously reallocated.

D. Dealer Profile

Participating dealers must register by creating a Dealer Profile on the UpgradeAndSavePA.com portal before May 31, 2018. Profile must include company name; address; a current, valid Pennsylvania Home Improvement Contractor number and W9 form. Dealers with completed profiles will be able to access the portal to submit pre-authorization requests and rebate applications, review the status of requests and applications, and update and track efficiency increases.

E. Pre-Approval of Rebate

Oilheat dealer must submit a pre-approval request to DVFDA/PPA at UpgradeAndSavePA.com in advance of the purchase and installation of any equipment. Pre-authorization request must include the dealer name and address, property owner name, property address, and expected installation date. Pre-authorizations will expire 60 days after authorization.

F. DVFDA/PPA Staff Approval of Rebate Forms

PPA staff will review and approve each application individually. Data missing on an application may delay or disqualify the application. False or misleading information may disqualify a rebate application or suspend a dealer from the program. Within thirty (30) days after the BSOHA, BHHCLV and PPA suspend or declare an application or dealer ineligible, they may appeal the action by submitting the appeal in writing to the PPA at 1866 PPA at 911B South Eisenhower Boulevard Middletown, PA 17057, Attention Mr. Ted Harris. Actions taken by the BSOHA, BHHCLV and PPA with respect to such appeals will be final.

G. Verification

A site inspection must be conducted prior to the submission of any rebate application for the purpose of verifying that the new heating oil system, including all equipment, is or was installed in compliance with all applicable Building Codes and/or NFPA 31 and is in safe operating condition. Only new appliances are eligible for rebates. The Customer Rebate Acknowledgement Form must accompany the application. PPA staff may choose to spot check random installations for quality control of program. The Oilheat Dealer agrees to comply with all rules and regulations governing the installation of the qualifying appliance, manufacturer's installation instructions and all applicable Building Codes.

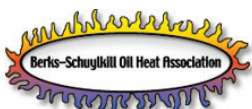
H. Applications

To apply for the rebate, the application must be made on the form provided by the PPA or online at UpgradeAndSavePA.com by an Oilheat dealer. All requested information must be provided along with the necessary documentation. To start the rebate program, an applicant needs to contact a registered Oilheat Dealer to complete the installation and process the application. This rebate is not affiliated with any other HVAC rebate programs.

I. ALL Rebate Applications through Oilheat Dealer ONLY

The Oilheat Dealer must submit the rebate application online at UpgradeAndSavePA.com, or mail/email all required documentation to the PPA at 911B South Eisenhower Boulevard Middletown, PA 17057. Applications must be submitted within thirty (30) days of the date of the installation. Allow 6-8 weeks for receipt of the rebate check. **Rebate check will be issued by NORA, sent to PPA for review, and then forwarded directly to the customer. The expiration of the rebate program is Dec 31, 2018 or when funds are no longer available. Limited time offer.**

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



5/1718