

Terms and Conditions

California E-Bike Incentive Project

Participant Terms and Conditions

Note to applicants: Both the Terms and Conditions and Implementation Manual that are in place at the time of application submission will be used to determine the applicant's eligibility for the California E-Bike Incentive Project.

General Participant Terms and Conditions

As a participant in the California E-Bike Incentive Project, you are applying for a one-time voucher to be used as a point-of-sale discount on the purchase of **one (1)** eligible electric bicycle (e-bike). The California E-Bike Incentive Project is administered through Pedal Ahead (or Administrator), in partnership with the California Air Resources Board (CARB). The necessary steps to completing an application for the e-bike incentive project can be found in the California E-Bike Incentive Project Implementation Manual and these Terms and Conditions.

All participants must apply for an incentive voucher through the California E-Bike Incentive Project website and the application must be approved by the program administrator **prior to** the purchase of an e-bike. Paper applications are also available and may be requested by emailing info@ebikeincentives.org. No reimbursement for the purchase of an e-bike will be made prior to being approved for a voucher.

Applications will be received on a first-come, first-served basis but will be processed on a hybrid needs-based methodology. Processing times may vary depending on the volume of applications received and the completeness and accuracy of the application. Delays beyond normal processing times may occur. Only submit your application when it is accurate and complete to the best of your knowledge.

The supporting documentation should be scanned and submitted securely through the California E-Bike Incentive Project website. Applicants without access may mail the supporting documentation to the Project Administrator: Pedal Ahead, California E-Bike Incentive Project, P.O. Box 16510, 3288 Adams Avenue, San Diego, CA 92116. If mailed, submittal date will be determined by U.S. mail postmark. For security purposes, supporting documents that are sent on removable media (flash drives, CDs, DVDs, etc.) will not be accepted. Due to security and privacy concerns, we strongly encourage

applicants to submit supporting documentation via our secure California E-Bike Incentive Project website.

Communication regarding applications will be made via email. It is the responsibility of the applicant to ensure the email address on file is accurate and allows emails from the Program's email. It is advised that applicants add the administrator's email domain, **@ebikeincentives.org**, to their safe senders list. Applicants are responsible for checking their emails related to the California E-Bike Incentive Project.

There is no guarantee that everyone who completes an application will receive an incentive voucher. If the California E-Bike Incentive Project funds become depleted, this information will be posted publicly on the Program website.

Application Clarifications

If the Program Administrator requests further information from the applicant for items that are missing, incomplete, or unclear, then the applicant must return the requested information within 14 calendar days, or the application will be rejected. Application processing order will be determined by when a complete application is submitted, not when it is started.

Participants with Approved Applications

If your application is approved, you will receive an approval email with your incentive voucher and other helpful information via email. Incentive vouchers are only to be used by the approved participant; they cannot be transferred. Incentive vouchers must be redeemed within 45 days of the date that the approval notification was issued. A one-time extension of 45 days may be requested in the case that an e-bike is unavailable within the first 45-day window. Participants are responsible for purchasing an e-bike that best suits their needs and lifestyle.

Before purchasing an e-bike, it is crucial that qualified applicants take the time to research, test, and decide which model fits their specific needs, desires, and lifestyle. Consider the following points:

- Conduct thorough research – compare different eligible e-bike models; compare features, technical specifications, and reviews to ensure the e-bike meets your requirements and preferences.
- Test ride – whenever possible, test ride the model to experience how it performs and gauge comfort, handling, and overall suitability.

- Return and exchange policies – be aware that these policies vary between retailers, make sure to understand the terms and conditions of the approved retailer on e-bike sales.
- Additional costs – returns may incur additional costs that are the responsibility of the consumer; these may include but are not limited to shipping fees, return fees, and restocking fees. These costs, if incurred, cannot be covered by the voucher.

Qualifying E-Bike Requirements

To redeem an incentive voucher, qualified applicants must purchase an eligible e-bike from an approved e-bike retailer. An up-to-date list of all participating retailers and eligible e-bikes will be made available to the participant at time of approval and can be found online on the project website.

Participants are responsible to pay any difference between the total purchase price and the incentive amount received.

Verifying Income Eligibility

Applicants must have a gross annual household income of less than or equal to 300% of the Federal Poverty Level (FPL). The Federal Poverty guidelines (U.S. Department of Health and Human Services, Office of Assistant Secretary for Planning and Evaluation: aspe.hhs.gov/poverty-guidelines) are issued each year in the Federal Register by the Department of Health and Human Services (HHS).

Table 1.2 2024 FPL as of January 17, 2024

| Persons in Household | Poverty Guideline | Gross Household Income 225% of FPL | Gross Household Income 300% of FPL |
|--|-------------------|------------------------------------|------------------------------------|
| For households with more than eight persons, add \$12,105 for each additional person (225%) or \$16,140 for each additional person (300%). | | | |
| 1 | \$15,060 | \$33,885 | \$45,180 |
| 2 | \$20,440 | \$45,990 | \$61,320 |
| 3 | \$25,820 | \$58,095 | \$77,460 |
| 4 | \$31,200 | \$70,200 | \$93,600 |
| 5 | \$36,580 | \$82,305 | \$109,740 |
| 6 | \$41,960 | \$94,410 | \$125,880 |
| 7 | \$47,340 | \$106,515 | \$142,020 |
| 8 | \$52,720 | \$118,620 | \$158,160 |

These requirements will be updated annually following the Federal Tax filing deadline to reflect the most recent Federal Poverty guidelines.

In the scope of this program, a household will be defined as the applicant plus any spouse, registered domestic partner (RDP), dependents, and guardians of the applicant.

Income considered for California E-Bike Incentive Project eligibility requirements is the gross annual household income of the applicant. Gross annual income is total earnings during a year before taxes or other deductions. Income from all sources, not just employment and income received in cash, shall be included in the calculation. This includes both taxable and nontaxable income sources.

Income sources include, but are not limited to, the following: employment wages and salaries, commissions and bonuses, self-employment income, unemployment benefits, worker’s compensation, Social Security, Supplemental Security Income, disability, pension or other retirement benefits or retirement income, annuities, alimony, child support, income from estates and trusts, public assistance, veterans’ payments, survivor benefits, interest and dividends, capital gains, rents, royalties, educational assistance from outside the household, and other miscellaneous sources.

When completing the online application, there will be instructions on providing proof of income. See Table 1.3 for examples of acceptable verification documents.

Federal Tax Transcripts will be accepted for the current and prior year up until the IRS filing deadline. After the deadline for the current year, only current year transcripts will be accepted. If the IRS filing deadline is extended, this policy may be adjusted to reflect the deadline extension. Once income verification has been completed for an application, requests to adjust tax years to accommodate income limit eligibility will not be honored.

For applicants submitting a tax transcript, the Program Administrator will review the following sections of the applicant's Federal tax return in determining gross annual income:

1. IRS Form 1040, the sum of lines 1-7:
 - a. Wages, salaries, tips, and other income
 - b. Tax-exempt and taxable interest
 - c. Qualified and ordinary dividends
 - d. IRA Distributions
 - e. Pensions and Annuities
 - f. Social Security benefits
 - g. Capital gain or loss
2. IRS Form 1040 Schedule 1 Part I, the sum of lines 1-8:
 - a. Taxable refund, credits, or offsets of state and local income taxes
 - b. Alimony received
 - c. Business income or loss
 - d. Other gains or losses
 - e. Rental real estate, royalties, partnerships, S corporations, trusts, etc.
 - f. Farm income or loss
 - g. Unemployment compensations
 - h. Other income

For instances that a negative income is listed on any section of the IRS Form 1040, this will be considered as zero income.

If an applicant does not file taxes, they are still required to submit an acceptable income verification document from Table 1.3. If an applicant has zero income, documentation will still be required. If additional proof of income documentation is required, the Program Administrator will request it. Applicants that are unable to submit accurate

proof of income documentation within 14 calendar days after receiving notification from the Program Administrator will not be eligible to receive an incentive voucher.

Table 1.3 Income Verification Document Requirements

| Income Type | Documentation Required | Additional Requirements |
|--|---------------------------------|--|
| Federal Tax Transcript | Tax Transcript | N/A |
| Supplemental Security Income (SSI) or Social Security | Award Letter | N/A |
| Permanent Disability | Award Letter | N/A |
| Pension/Annuity Benefits | Benefit Verification Letter | N/A |
| VA Benefits | Benefit Award Letter | N/A |
| Wages | W-2 Employee Pay Stubs | Three months most recent |
| Self-employment | IRS Form 1099 | N/A |
| Unemployment | Award Letter Bank Statements | N/A Three months most recent |
| Workers Compensation | Award Letter Bank Statements | N/A Three months most recent |
| Public Assistance or Welfare | Award Letter Bank Statements | N/A Three months most recent |
| Alimony | Court Letter | N/A |
| Child Support | Court Letter | N/A |
| Income from a decedent/ interest from estate or trust | Court Letter Bank Statements | N/A Three months most recent |
| Income Other than Listed | Any Verifying Documents | Must be reviewed by the Program Administrator and approved by CARB |

Income documents must provide complete income documentation for all members of the household, including dependents when applicable. Applicants that submit documentation that indicates they filed Married Filing Separately on their federal tax returns must submit income documentation for their spouse. If an applicant is claimed

as a dependent, they must submit income documentation for the person that claims them.

Categorical Eligibility

If an applicant participates in one or more of the public assistance programs on the following Categorical Eligibility List, they may also submit documentation confirming their participation for consideration by the Program Administrator. Depending on the program, required documentation may vary.

Categorical Eligibility List:

- [Medicaid](#)
- [Medi-Cal \(Income Qualified Medi-Cal Only\)](#)
- [SSI \(Supplemental Security Income\)](#)
- [CAPI \(Cash Assistance Program for Immigrants\)](#)
- [Access Clean California](#)
- [Driving Clean Assistance Program](#)
- [Regional Clean Cars 4 All](#)
- Section 8 Rental Certificate Program for Very Low and Extremely Low Income classifications (HUD)

Online Purchases

As part of our e-bike incentive program, we are pleased to offer vouchers that can be used towards purchasing e-bikes from various online retailers. However, it is the responsibility of each consumer to exercise caution and due diligence during their purchase. Please be aware that while we provide a list of participants where the vouchers can be applied, we do not conduct thorough vetting of the website security. Our list is a reference for where the vouchers are accepted, but it does not imply endorsement or guarantee of the website's security or service quality.

We strongly advise all incentive awardees to:

- Verify the legitimacy and reputation of the retailer before making a purchase.
- Ensure the website is secure, especially when entering personal and financial information.
- Be cautious about sharing personal data and only provide what is necessary for the transaction.
- Consider using secure payment methods that offer some level of protection.

We'd like to encourage you to be vigilant and informed in your purchasing decisions. While we aim to facilitate your access to e-bikes through these incentives, the responsibility for a safe and secure transaction ultimately lies with you, the consumer.

Case Evaluations

The case evaluation request process should not be used to request exceptions to the requirements and policies of the program. Case evaluations should only be requested when the applicant/consumer believes that the California E-Bike Incentive Project Terms and Conditions and/or the California E-Bike Incentive Project Implementation Manual are not adhered to. The act of submitting a case evaluation request does not reserve funding.

Applicants whose incentive applications have been approved, cancelled, rejected, or denied by the Administrator may request a case evaluation within ten calendar days of the date of approval/cancellation/rejection/denial (mailed hard copy case evaluation requests must be postmarked within ten calendar days of application approval/cancellation/rejection/denial). Case evaluation requests must set forth all facts that form the basis for a case evaluation request. If the only basis for a case evaluation request is that the applicant/consumer disagrees with the policies set forth in the California E-Bike Incentive Project Terms and Conditions and/or the Implementation Manual, then there is no basis for a case evaluation request, the case evaluation will be closed, and the Program Administrator's original decision will stand. There is no right to administrative or judicial appeal.

For security reasons, emailed case evaluation requests will not be accepted. Instructions on how to submit a case evaluation request are in the California E-Bike Incentive Project Implementation Manual.

Data Collection

By submitting an application and receiving an incentive voucher you authorize CARB and Pedal Ahead to: collect and publish data related to participation in the California E-Bike Incentive Project; send emails, text messages, surveys, and other notifications related to the Program; share your responses to any of these communications; publish the results for regulatory and promotional purposes; and use any video or photographs taken of you in connection with the Program.

Where there is any need for data capture, this information will be stored securely. Any data shared by a third party will be secured by the verified resource.

Indemnification and Waiver

You shall defend, indemnify, and hold us, our parent and affiliated entities and all other partners or sponsors of the California E-Bike Incentive Project harmless from and against any and all losses, liabilities, damages, injuries, claims, demands, awards, costs, attorney fees, and other expenses incurred by us in any manner from the use of the e-bike by you or any other person, including claims of, or liabilities to third parties. There is no right to administrative or judicial appeal.

YOU WAIVE ALL/ANY CLAIM AGAINST US, PARENT AND AFFILIATED ENTITIES AND ALL OTHER PARTNERS OR SPONSORS OF THE ELECTRIC BICYCLE INCENTIVE PROJECT FOR INCIDENTAL, SPECIAL, LOST PROFITS OR CONSEQUENTIAL DAMAGES IN CONNECTION WITH THIS INCENTIVE PROGRAM.

Signature

By signing these Terms and Conditions, I agree that I have read and understood the California E-Bike Incentive Project Terms and Conditions, and the California E-Bike Incentive Project Implementation Manual.

Signature

Printed Name

Date