

Terms and Conditions

California E-Bike Incentive Project

Participant Terms and Conditions

Note to applicants: Both the Terms and Conditions and Implementation Manual that is 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 an eligible electric bicycle (e-bike) from the California Air Resources Board (CARB) that is administered through Pedal Ahead (or Administrator). 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.

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.

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.

Communication regarding applications will be made via email. It is the responsibility of the applicant to ensure the email on file is accurate and allows emails from the Program email. It is advised that applicants add the administrator's email domain, info@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, the applicant must return the information within 14 calendar days. 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 or letter 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.

Qualifying E-Bike Requirements

To redeem an incentive voucher, participants must purchase a qualifying e-bike from an authorized e-bike retailer. When purchasing from an authorized online retailer, participants must purchase an e-bike from the list of eligible e-bikes for that 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 2023 FPL as of January 19, 2023

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 \$11,565 for each additional person (225%) or \$15,420 for each additional person (300%).			
1	\$14,580	\$32,805	\$43,740
2	\$19,720	\$44,370	\$59,160
3	\$24,860	\$55,935	\$74,580
4	\$30,000	\$67,500	\$90,000
5	\$35,140	\$79,065	\$105,420
6	\$40,280	\$90,630	\$120,840
7	\$45,420	\$102,195	\$136,260
8	\$50,560	\$113,760	\$151,680

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

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, commission and bonuses, self-employment income, unemployment benefits, worker's compensation, Social Security, Supplemental Security Income, disability, pension or other retirement benefits, annuities, alimony, child support, income from estates and trusts, public assistance, interest and dividends, capital gains, royalties, and other 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.

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:
 - Wages, salaries, tips, and other income
 - Tax-exempt and taxable interest
 - Qualified and ordinary dividends
 - IRA Distributions
 - Pensions and Annuities
 - Social Security benefits
 - Capital gain or loss
2. IRS Form 1040 Schedule 1 Part I, the sum of lines 1-8:
 - Taxable refund, credits, or offsets of state and local income taxes
 - Alimony received
 - Business income or loss
 - Other gains or losses
 - Rental real estate, royalties, partnerships, S corporations, trusts, etc.
 - Farm income or loss
 - Unemployment compensations
 - 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 may not be eligible to receive an incentive voucher.

Table 1.3 Income Verification Document Requirements

Income Type	Documentation Required	Additional Requirements
Previous year Tax Transcript	1040 or 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 Form1099	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.

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, including the California E-Bike Incentive Project Implementation Manual.

Signature

Printed Name

Date