

SACRAMENTO METROPOLITAN



# E-BIKE RETAILER MANUAL

# Contents

Program Overview .....	2
1. Verifying and Redeeming Award Letter.....	2
2. Verify the Eligibility of the E-bike .....	3
3.1 Approved E-bikes Equipment and Accessories.....	4
4. Complete the Purchase .....	4
5. Upload purchase documents and relevant information into the Retailer Fluxx Portal .....	5
6. Receive the reimbursement via Electronic Funds Transfer (ACH).....	6
7. Bike Return/Exchange .....	6

## Program Overview

The Sacramento Metropolitan Air Quality Management District (District) Clean Cars 4 All Program (CC4A) offers income-qualified Sacramento County residents grants to scrap their old car and upgrade to a new or used electric vehicle (EV) or new electric bike. The District partners with car dealers, e-bike retailers, dismantlers, utility agencies, and case managers to administer the CC4A program. Participants apply for a CC4A grant through an online portal. The District reviews their information and determines if they are eligible. Once deemed eligible, participants go to an authorized dismantler for a pre-inspection to verify that their old vehicle is still operable. Participants are sent an award letter once they have passed the pre-inspection and signed the program's terms and conditions. Participants are given a 60-day window to shop for an electric vehicle or e-bike at a participating dealership or retailer. Once the participant selects an e-bike, the grant amount is taken off the price of the e-bike at the time of purchase. E-bike retailers can request reimbursement through the program online portal and must submit all required documentation to show that any e-bike and accessories sold meet all program requirements. District staff review reimbursement requests and approve them when complete. Once a grant has been reimbursed to the retailer, the District informs participants that they may turn in their old car to one of the authorized dismantlers for recycling.

### 1. Verifying and Redeeming Award Letter

CC4A program participants are eligible for an incentive at the point of sale, so the participants will already be approved when they come to shop at your retail location. If a participant comes in before they are awarded, retailers should encourage them to wait until they are awarded a grant before selecting and purchasing an e-bike. Waiting for an award letter will save retailers time and ensure that their staff is helping eligible participants. You can help the participant redeem their award letter by the steps outlined below.

Once you sign and return the CC4A retailer contract, your shop will be added to the online CC4A program roster as a participating e-bike retailer where CC4A awardees can redeem their grant. The District will provide you a login during the onboarding process to access the program online portal. Each approved applicant will bring their award letter with their ID for you to verify with them. Login to the retailer portal to check:

- The name on identification and award letter match.
- The award letter has not expired.
- The award letter has not already been redeemed.
- The award letter amount.

## 2. Verify the Eligibility of the E-bike

E-bike grants are available for a maximum of \$7,500 for the purchase of multiple bikes based on the household size of the applicant. The award letter will indicate the maximum number of bikes the participant is eligible to purchase. There is no cap cost on eligible e-bikes. If the costs of the e-bikes exceed the grant amount, the participant is responsible for paying the difference. The award letter includes a checklist that outlines e-bike eligibility criteria. Verify that any selected e-bike sold under the CC4A program meets those criteria:

E-bike Checklist		
Must be NEW, not used or previously owned	<input type="checkbox"/> yes	<input type="checkbox"/> no
Must have motor less than or equal to 750 Watts	<input type="checkbox"/> yes	<input type="checkbox"/> no
Must be Class 1 or 2. Class 3 e-bikes are NOT eligible	<input type="checkbox"/> yes	<input type="checkbox"/> no
Must have operable pedals	<input type="checkbox"/> yes	<input type="checkbox"/> no
Must have integrated front and rear lights	<input type="checkbox"/> yes	<input type="checkbox"/> no
Must have a minimum one-year warranty on all electrical components	<input type="checkbox"/> yes	<input type="checkbox"/> no
Must be fully assembled at time of purchase	<input type="checkbox"/> yes	<input type="checkbox"/> no
A helmet and bike lock are mandatory with the purchase of each e-bike.	<input type="checkbox"/> yes	<input type="checkbox"/> no
Approved accessories must fit the e-bike.	<input type="checkbox"/> yes	<input type="checkbox"/> no

Participating retailers may not sell any of the following as a replacement mobility option:

- Used electric bikes;
- Electric bike conversion kits;
- Bicycles modified with electric bikes conversion kits, mopeds, or scooters;
- Electric bikes outside of the Class 1 and Class 2 system.

Retailers may refer to the [California Vehicle Code](#) for help determining e-bike classifications and prohibitions. Based on the vehicle code, on and after January 1, 2017, manufacturers and distributors of e-bikes shall apply a label that is permanently affixed, in a prominent location, to each electric bicycle. The label shall contain the classification number, top assisted speed, and motor wattage of the electric bicycle, and shall be printed in Arial font in at least 9-point type. The District will rely on this labeling in reviewing e-bike eligibility.

### 3.1 Approved E-bikes Equipment and Accessories

Retailers may offer for sale approved electric bike accessories such as maintenance tools, or accessories that pertain to the safety and security of the rider as well as increase the electric bike's carrying capacity. Retailers may also offer service and maintenance plans to support e-bike purchases during the required 30-month ownership period.

Eligible accessories must be purchased at the same time as the e-bike. The grant cannot be used in a separate purchase of e-bike accessories. If the costs of the additional equipment exceed the grant amount, the participant is responsible for paying the difference.

Adaptive e-bikes are designed to meet the specialized needs of an individual rider who is unable to use a standard bike. This includes recumbent e-bikes, trikes, tandem e-bikes, or other e-bikes that have been adapted for a specific need of the rider if they meet the program criteria in Section 3.

Approved Accessories
<b>Safety:</b> helmet—Multi-directional Impact Protection System (MIPS) style is recommended), reflective jacket or vest, lights, fenders, bell or horn, pant clips
<b>Security:</b> locks—must be heavy duty and be equipped with a keyed U bolt or chain. Combination and cable locks are ineligible. Locks should be rated Sold Secure Gold or ART 3 stars or higher. Wheel and seat security—Options include one or more cables that can be locked with the main lock (or cable locks), security skewers, pin lock bolts and seat post lock or cable. Lockable battery/secondary battery, GPS tracker
<b>Carrying capacity</b> —cargo rack, panniers (up to 2 per e-bike), child seat and/or bars, front basket, bicycles strollers or trailers
<b>Tools</b> — pump and pressure gauge, patch kit and spare tubes (up to 2 per bike), tire irons and levers, wrench and hex key set, kickstand, chain wear gauge, chain lubricant.
<b>30-month maintenance or service plan</b>

## 4. Complete the Purchase

Retailers will deduct the award letter amount from the cost of the bike and approved accessories. Retailers agree that each e-bike will be assembled completely before handing over to the customer. Shipping and assembly costs are reimbursable expenses and should be added to the total bike price, NOT as a separate itemized cost on the sales receipt. The District will not reimburse retailers for layaway items or ordered shipments.

## 5. Upload purchase documents and relevant information into the Retailer Fluxx Portal

The District will only reimburse e-bike retailers up to the amount stipulated on the award letter issued to a grantee. It is the sole responsibility of the participating retailer to verify a grantee's award letter by logging into the Fluxx portal, prior to completing a sale and applying the point-of-sale discount. Detailed instructions on navigating the Fluxx payment dashboard are provided to each retailer once the logins are created. The District will reimburse retailers only for the grant amount towards electric bikes and accessories sold that meet eligibility requirements. Please contact the District with any questions if you're unsure about the eligibility of potential e-bikes or accessories. You can leave a note in the Fluxx portal or reach out to either our case management team at [cc4a@energycenter.org](mailto:cc4a@energycenter.org) or the District at [CleanCars4All@airquality.org](mailto:CleanCars4All@airquality.org).

Once a sale is complete (e-bike and accessories delivered to the customer), retailers may submit their payment request through Fluxx using their logins provided by the District. The District requires that all items on the award letter e-bike checklist be addressed to approve a reimbursement request. An invoice must be submitted separately for each individual customer's award letter.

Invoices must include the grantee's full name, purchase order number, date of purchase, description of electric bike(s) purchased, description of each approved accessory and the grant amount (invoice amount). The invoice must be signed and dated by the grantee to indicate that they have taken delivery of the e-bike and accessories. Invoices must be itemized and must provide the final purchase price less the grant award amount. Once a payment request is made through the Fluxx online portal, the District will review all items in the e-bike reimbursement request. If there are errors on submitted items or more information/photos are needed, the District will notify dealer in Fluxx. The District will pay out on requests within 30 days once all necessary documents and photos are submitted. As previously noted, shipping and assembly costs are reimbursable expenses and should be added to the total bike price, NOT as a separate itemized cost on the sales receipt. The reimbursement request must include at a minimum the following:

1. Photos of the assembled e-bike(s) as follows:
  - a. Assembled e-bike(s) standing and showing integrated lights
  - b. E- bike serial number(s)
  - c. E-bike(s) Class
2. Class type of lock and helmet
3. Any allowable accessories clearly identifiable
4. Confirmation of warranty
5. E-bike specification sheet
6. Pre-paid maintenance plan, if applicable

7. Taxes and total
8. Invoice / Receipt signed and dated by grantee

## 6. Receive the reimbursement via Electronic Funds Transfer (ACH)

Once an award letter is redeemed and all the appropriate materials have been uploaded with a reimbursement request in the Fluxx portal, ACH payments should be received within 2 weeks.

## 7. Bike Return/Exchange

If a grantee returns the e-bike to the retailer after the grant amount has been reimbursed to the retailer, both the grantee and the retailer are responsible for reporting the return and the reason for the return to the District. The grant amount must be returned, and the retailer shall contact the District for further information and instructions. If a participant exchanges their purchased e-bike for another, it is the responsibility of both the participant and retailer to report this information to the District. The e-bike received in exchange must meet e-bike eligibility criteria. Retailers must provide updated information on sales price, accessories, and e-bike information. If there is any difference in the grant amount on the exchange, retailers must contact the District for further information and instructions. Any difference in the price of the e-bike is the responsibility of the grantee.