



Residential Charging Solutions

Terms and Conditions

The following Terms and Conditions apply to all Pacific Gas and Electric Company (PG&E) Residential Charging Solutions Rebate Applications submitted on and after the program launch on November 17, 2023.

- 1. To be eligible for the Pacific Gas and Electric Company (PG&E) Residential Charging Solutions Rebate (Rebate), the applicant (“Applicant”) must:**
 - a. Be a customer of PG&E with an active residential Electric Service Agreement.**
 - i. PG&E gas-only residential customers who receive electric service from a municipality are not eligible.
 - ii. Applications with a vehicle registered at an address that has a commercial account for their PG&E Electric Service Agreement are not eligible.
 - iii. Community Choice Aggregation (CCA) and Direct Access (DA) customers are eligible for the rebate.
 - iv. The name on the PG&E Service Agreement does not need to match the Applicant’s name.
 - b. Purchase an eligible equipment for the rebate. The current list of eligible equipment can be found on the program website.**
 - c. Meet the income requirements for the Residential Charging Solutions Rebate by either:**
 - i. Scenario 1: Applicant participated in and provides proof of enrollment, listing the Applicant as the participant, for at least one of the below listed public assistance programs at the date of purchase of the eligible equipment. The name of the Applicant must match the name of the participant enrolled in the eligible public assistance program to be eligible. If the specific proof of enrollment requested cannot be provided, the Applicant must provide proof of enrollment in another eligible public assistance program or must go through income verification in order to be eligible for the Rebate. The public assistance programs eligible for the Rebate are found on the program website.**
 - ii. Scenario 2: Applicant and their household meet the annual gross income limits set for their household size and the county within the Pacific Gas and Electric territory they resided in at the time of eligible equipment purchase. Income limits for each county in Pacific Gas and Electric (PG&E) territory are based on the State Income**

Limits set by California’s Department of Housing and Community Development (HCD) and are updated annually. Applicants can reference the current program income limits for each zip code and household size on the Pre-Owned EV Rebate website at <https://evrebates.pge.com/program-requirements>.

1. As defined by PG&E Residential Charging Solutions Rebate program, “household size” means the taxpayer(s) and any individuals who are claimed as dependents on the federal income tax return filed for the same year of purchasing the eligible equipment. If the tax return for the year of purchasing the equipment has not yet been filed, the most recently filed tax return within two (2) years of the year of equipment purchase will be required for household size verification. Individuals that reside at the PG&E Electric Service Agreement address but that are not listed on the Applicant’s filed tax return will not be included in the “household size” for the purposes of the Rebate.
2. As defined by Residential Charging Solutions Rebate program, “gross income” includes both taxable and non-taxable income. This includes, but is not limited to, the following: Wages, unemployment, workers' compensation, Social Security, Supplemental Security Income, public assistance, veterans' payments, survivor benefits, pension or retirement income, interest, dividends, rents, royalties, income from estates, trusts, educational assistance, alimony, child support, assistance from outside the household, and other miscellaneous sources.
3. As proof of income eligibility, Applicants must provide:
 - A completed Household Summary Form that reflects the household members included on the Applicant's most recently filed tax return, including any spouse or dependents of any age; and
 - A completed and signed IRS Form 4506-C for each person over the age of 18 included on the Applicant’s filed tax return, regardless of filing status, for the year in which the Applicant’s eligible equipment was purchased. Dependents of the Applicant that were 17 or younger on the date of equipment purchase do not need to complete a 4506-C regardless of their age at the time of submitting the Application.
4. If an application is submitted prior to the deadline for the last complete tax year’s return, the return for the previous year will be requested instead. For example, an applicant applying before the deadline to file their 2022 tax return will be asked to fill out a 4506-C for their 2021 tax return. If an applicant has filed for the most recent tax year before the tax filing deadline, then, before their Rebate Plus application is processed, the applicant may request that their income is evaluated on their most recently filed tax return.
 - For example, an applicant who had already filed their 2022 taxes in February

of 2023 and applied in March of 2023 may request that their tax return for tax year 2022 is evaluated. However, once Income Verification has been completed for an application, requests to adjust tax years to accommodate income limit eligibility will not be eligible.

5. If the tax return for the year of eligible equipment purchase has not yet been filed, the most recently filed tax return within two (2) years of the year of equipment purchase will be requested for income verification.
6. If Applicant has not filed a tax return within two (2) years of the year the eligible equipment was purchased, PG&E may, at its sole discretion, consider additional documentation to calculate income. Examples of additional documentation that may be required include pay stubs, W2's, Supplemental Security Income (SSI) benefit documents, etc. Filing an extension for the tax year being requested is not considered filing for the purposes of the Program's income calculations. In these cases, additional documentation may be requested to evaluate the Applicant's income for that non-filing year. If Applicant is unable to provide additional requested documentation to complete income verification, the Applicant is not eligible for the Rebate.

iii. An Applicant who is claimed as a dependent for federal income tax purposes for the tax year the eligible equipment is purchased, as verified on the sale filed, complete tax year's return transcript, is not eligible for the Rebate regardless of that person's income. Proof of enrollment documentation that lists the Applicant as a dependent will be considered proof of dependency status and the Applicant will not be eligible for the Rebate.

d. Provide a copy of the following documents with the required information below during the application process to confirm purchase and installation of eligible equipment:

- i. Proof of Purchase Receipt for eligible equipment which clearly shows:
 1. Equipment vendor's name
 2. Applicant's name
 3. Applicant's shipping address
 4. Purchase date
 5. Purchase price
 6. Equipment's model
- ii. Proof the equipment is installed and ready for use. Requirements may differ by the purchased equipment and are listed on the program website. Required proof includes:
 1. Photo(s) of the equipment mounted to the wall or plugged in, and its serial number
 2. If applicable, an electrician's invoice with the contractor's name and license number and the applicant's name and address in the "bill to" field for the installation of a dedicated 240-volt outlet.

- e. Ship and install the eligible equipment at the same Service Address corresponding to the Applicant's residential PG&E Electric Service Agreement. The Applicant's name and address on the application must match the name and address listed on the equipment's purchase receipt, vehicle registration card, the Service Address, and if applicable, on the electrician's invoice associated with the residential PG&E Electric Service Agreement ID provided.
 - f. Provide a copy of the Applicant's current DMV registration card for a Battery Electric Vehicle (BEV or Plug-in Hybrid Electric Vehicle (PHEV). The vehicle owner's name and the vehicle must be registered at the same Service Address corresponding to the Applicant's residential PG&E Electric Service Agreement and shipping address on the equipment's proof of purchase receipt.
 - g. Successfully submit a Rebate application on or after the program launch date of November 17, 2023 (Note: the Applicant may not start a Rebate application prior to purchasing the eligible equipment. An application is considered submitted once the application form is completely filled out, all supporting documents are uploaded, and the Applicant receives an email confirmation that the application and documents were submitted.
 - h. Agree to the Residential Charging Solutions' Terms and Conditions.
2. Each customer household with an individual residential PG&E Electric Service Agreement ID is only eligible to receive one PG&E Residential Charging Solutions Rebate. Note: On a case-by-case basis, and in PG&E's sole discretion, PG&E may waive this limitation upon request (i.e., where a multi-unit dwelling shares a PG&E Electric Service Agreement).
 3. The current Rebate amount is set forth on the Application. Rebate amounts are subject to change at any time. The Applicant will be eligible for the Rebate amount posted on the application at the time the application is completed and accepted. Rebate funds are limited and are available on a first-come, first-served basis.
 4. Incomplete or incorrect applications will not be processed. Applications must include all required information, including an acceptable proof of purchase receipt for the eligible equipment, photos of the equipment installed for use, income verification documents, and valid vehicle registration (permanent or temporary registration).
 5. The name and address on the application must be an exact match to the name shown on the income verification documents and the eligible equipment's proof of purchase receipt, and at least one name shown on the vehicle registration. However, if the customer name entered on the application is not an exact match, PG&E may, in its sole discretion if it determines that the names are substantially similar, edit the applicant's name to match that on the income verification documents and equipment's proof of purchase receipt (e.g., "Matt" becomes "Matthew").

6. If the customer name entered on the application is not the same name as at least one registered owner of the vehicle on the registration, the application will be rejected. A registered owner may submit a new application in their own name, if eligible.
7. Program communications, such as requests for additional documentation, Application approval notifications, and payment notifications, will be sent via email. It is the Applicant's responsibility to ensure their email address is accurate and permits the receipt of program emails. Denial of a Rebate due to failure to respond to electronic communication, including failure to respond due to program emails being filtered as spam, is not appealable.
8. The Rebate and the terms and conditions of the PG&E Residential Charging Solutions Rebate (Program) are subject to change, and the Program can be terminated at any time by PG&E and/or the California Public Utilities Commission (CPUC). Any information provided in the Rebate application may be used internally by PG&E for purposes other than processing the application and may be made available to the CPUC and the California Air Resources Board.
9. You authorize PG&E to send you email messages to the email address you have provided related to the Rebate and the Program, including but not limited to, information about plug-in electric vehicles, electric vehicle rate plans, information about charging or charging programs, and surveys regarding your electric vehicle experience. You: (i) acknowledge that you are the authorized user of the email address provided in the application; (ii) grant PG&E express permission to send emails related to your application to that email address until such permission is expressly revoked by you; and (iii) notwithstanding that this email address may be on the federal or a state's Do Not Contact list, acknowledge that such emails sent by PG&E shall not be in violation of any Do Not Contact list(s).
10. You certify that the information provided in your application is true and correct. You agree to provide any additional information that PG&E may request from you to confirm the accuracy of the information you provide and your eligibility for the Rebate. You acknowledge and understand that obtaining rebates by submitting intentionally inaccurate information and/or making fraudulent misrepresentations or omissions is strictly prohibited, that any wrongfully obtained rebates must be refunded, and that you may be subject to additional civil and criminal liability as a result. You further understand that PG&E may report and release information concerning such wrongdoing to state and local law enforcement, the California Department of Motor Vehicles, and any other appropriate authorities.
11. The Rebate payment shall go directly to the Applicant listed on the application. Payment cannot be assigned or transferred. Applicant is responsible for paying all tax liability imposed as a result of receiving the Rebate. Applicant should consult a tax advisor concerning the taxability of the Rebate, and PG&E is not responsible for any taxes imposed on Applicant as a

result of receipt of the Rebate.

- 12. PG&E makes no representations, expressed or implied, regarding the design, construction, reliability, efficiency, performance, operation, maintenance, or use of any the eligible equipment, discussed, selected, rejected, purchased, installed or otherwise considered by customer. Any decisions regarding the selection, design, purchase, use and operation of any of the eligible equipment shall be at the sole discretion and are the sole responsibility of the customer. PG&E does not guarantee energy or bill savings as a result of this Rebate.**

- 13. Release and Indemnification: Applicant agrees to release and hold harmless PG&E, its officers, directors, shareholders, employees and contractors from and against any and all causes of action, damages, losses, claims, expenses, demands, costs (including attorneys' fees and expenses and all court, arbitration or other dispute resolution costs), or any of them, resulting from, arising out of, or in any way directly connected with this Program, Applicant's receipt of the Rebate, failure to receive the Rebate, any taxes associated therewith, or Applicant's vehicle registration or registration status. PG&E makes no representations or warranties regarding whether Applicant will or will not qualify to receive the Rebate.**

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