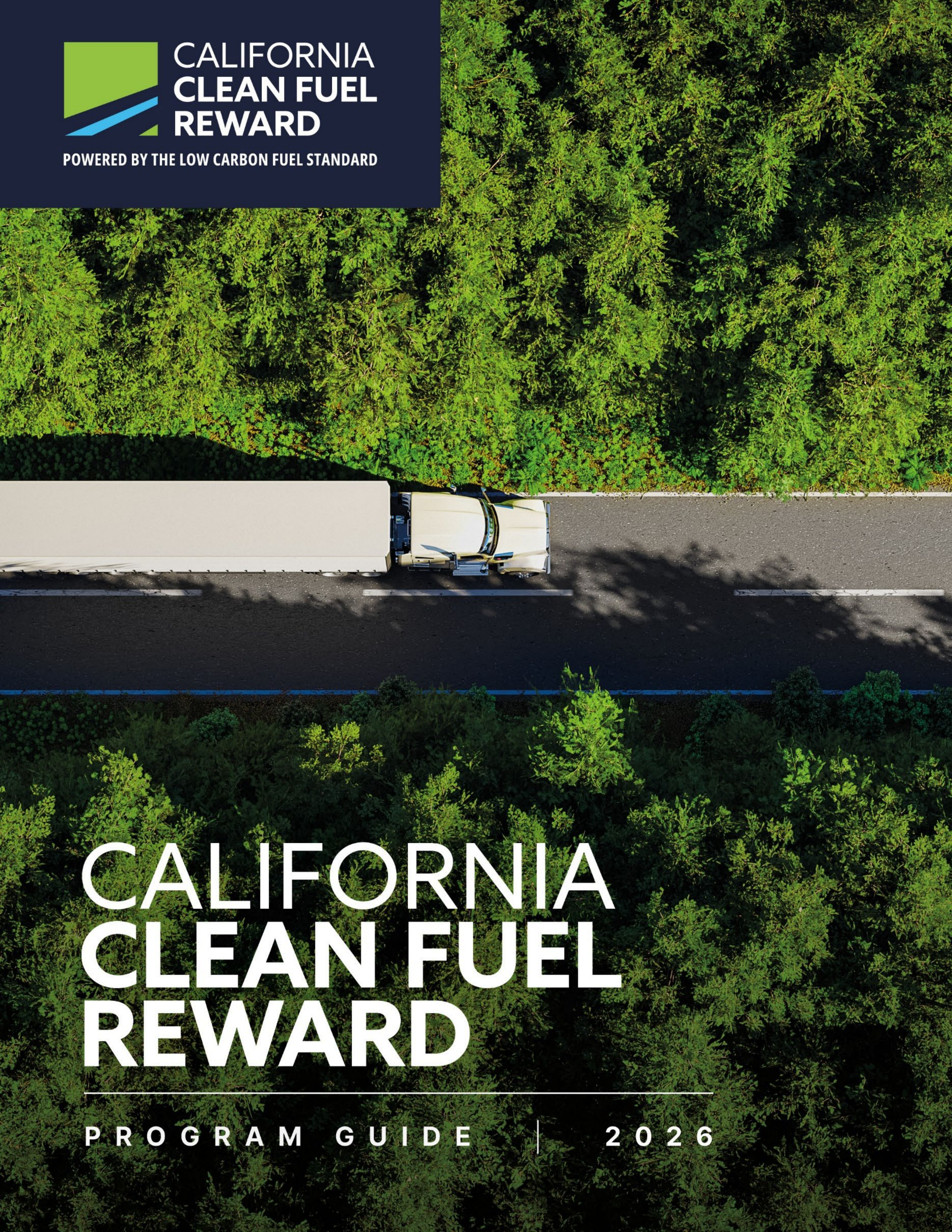

CALIFORNIA
CLEAN FUEL
REWARD

POWERED BY THE LOW CARBON FUEL STANDARD

CALIFORNIA CLEAN FUEL REWARD

PROGRAM GUIDE | 2026

Current Version: [v2.0 | Revised 6/23/26]

VERSION HISTORY

VERSION	DATE	CHANGES
1.1	5/11/26	• Enrollment launch
1.61-1.63	6/1/26	• v1 interstitial release to update Program requirements and clarify terms
2.0	6/23/26	• Release for Program launch

Note: *This Program is funded through California's Low Carbon Fuel Standard (LCFS). This Program is not funded by customer or ratepayer dollars.*

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Note: *This Program is funded through California's Low Carbon Fuel Standard (LCFS). This Program is not funded by customer or ratepayer dollars.*

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California Clean Fuel Reward

PROGRAM GUIDE

v2.0 | Revised 6/23/26

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Program Guide Authority and Version Control
The most current version of the California Clean Fuel Reward Program Guide ("Program Guide," "Participating Retailer Program Guide") shall at all times be deemed the authoritative version and shall supersede any and all prior versions. The latest published version of the Program Guide is available at: cleanfuelreward.com/pdf/PROGRAM-GUIDE.pdf.

The Program Administrator and Program Implementer retain sole discretion to interpret, apply, and enforce Program rules and requirements, and to amend, modify, or update the Program Guide at any time without prior notice. This Program Guide constitutes the primary and controlling reference for all California Clean Fuel Reward program rules, requirements, and procedures, subject in all respects to the Program Administrator's and Program Implementer's reserved authority, as described herein, to interpret, apply, and enforce Program rules and requirements, which shall remain final and controlling.

Conflict of Terms
In the event of any conflict, inconsistency, or contradiction between the terms of this Program Guide and any fully executed, signed Program agreement or document, the terms of such signed agreement or document shall prevail and govern, subject in all respects to the Program Administrator's and Program Implementer's reserved authority, as described herein, to interpret, apply, and enforce Program rules and requirements, which shall remain final and controlling.

Eligibility, Compatibility, and Assumption of Risk

- Participating Retailers are solely responsible for verifying customer and vehicle eligibility prior to offering or applying the California Clean Fuel Reward and assume all risk for claims rejected due to ineligibility.
- Eligible Customers and Participating Retailers are likewise solely responsible for:
  - Determining whether the California Clean Fuel Reward may be combined with other rebate or incentive programs, as applicable; and
  - Ensuring compliance with all applicable program rules and requirements.

When combining the California Clean Fuel Reward with other potentially compatible programs, Eligible Customers and Participating Retailers shall further bear all risks, costs, liabilities, and any penalties arising from claims rejected due to ineligibility, incompatibility, or failure to meet applicable requirements. The California Clean Fuel Reward does not review, prevent, or ensure compatibility with other programs and does not provide guidance or support regarding such programs.

ABOUT THE CALIFORNIA CLEAN FUEL REWARD

The California Clean Fuel Reward (CCFR, the "Program") is a California statewide electric vehicle ("EV") time-of-sale (or lease) Program funded by the credit revenues generated pursuant to the Low Carbon Fuel Standard (LCFS) regulation administered by the California Air Resources Board (CARB).

The Program is administered by Southern California Edison (SCE, the "Program Administrator") on behalf of other Participating Electric Distribution Utilities across the state ("Participating EDUs"). The "Program Implementer" contracted to implement the Program is Maritz Motivation, Inc., a Missouri corporation.

Program Purpose

The California Clean Fuel Reward offers a per-vehicle point of sale or lease price reduction (the "Reward") designed to help lower the upfront cost of buying or leasing new medium- and heavy-duty battery-electric vehicles (BEVs) for commercial use.

Program Guide Audience

This Program Guide has been written as a comprehensive source of Program information for retailers, customers, EDUs, and Program partners. If any provision of the Program Guide directly conflicts with any other applicable signed agreement between the parties, the terms of the signed agreement shall control.

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PROGRAM TERMS AND DEFINITIONS

TERM	DEFINITION
ACF Rule (“ACF Regulation”)	Advanced Clean Fleets (ACF) Regulation. A **California Air Resources Board** (CARB) rule that requires State and Local Government Agency fleets to reduce emissions by increasing the use of **zero-emission vehicles** (ZEVs). See ww2.arb.ca.gov/our-work/programs/advanced-clean-fleets for more information.
Admin	For the purposes of this Program, **“admin”** or “administrator” refers to a type of account used by Participating Retailers on the California Clean Fuel Reward **Retailer Portal**. Admins have elevated permissions to access information and manage users and settings on the Retailer Portal. Each Participating Retailer may have up to two (2) admin accounts and ten (10) **user** accounts on the Retailer Portal.
BEV	Battery-electric vehicle. A motor vehicle fully powered by electricity stored in a rechargeable battery pack. Only BEVs are eligible for the California Clean Fuel Reward (hybrid, fuel cell, compressed natural gas, and/or other alternative fuel vehicles do not qualify).
California Vehicle Code (CVC)	A legal code that regulates all aspects of motor vehicle use in the state of California, including licensing, registration, insurance, traffic laws, operator requirements, and penalties for infraction.
CARB	California Air Resources Board. An agency of California’s state government focused on reducing air pollution and maintaining healthy air quality.
CCFR	California Clean Fuel Reward, or the “Program.”
Claim	For the purposes of this Program, a **“claim”** is a **Participating Retailer’s** request for reimbursement, including all necessary information, **required documents**, and supporting materials as applicable. By submitting a claim, the Participating Retailer confirms that all eligibility requirements and Program terms have been met.
Class 2b	Medium-duty vehicles with a **Gross Vehicle Weight Rating** (GVWR) of 8,501–10,000 pounds (3,856–4,536 kg).
Class 3	Medium-duty vehicles with a GVWR of 10,001–14,000 pounds (4,536–6,350 kg).

***Note:** This Program is funded through California’s Low Carbon Fuel Standard (LCFS). This Program is not funded by customer or ratepayer dollars.*

Questions? Contact Program Headquarters at **800-880-0320**
8:00 a.m.–5:00 p.m. PT, Mon–Fri (excluding holidays)
or email info@cleanfuelreward.com
cleanfuelreward.com

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TERM	DEFINITION
Class 4	Medium-duty vehicles with a GVWR of 14,001–16,000 pounds (6,351–7,257 kg).
Class 5	Medium-duty vehicles with a GVWR of 16,001–19,500 pounds (7,258–8,845 kg).
Class 6	Medium-duty vehicles with a GVWR of 19,501–26,000 pounds (8,846–11,793 kg).
Class 7	Heavy-duty vehicles with a GVWR of 26,001–33,000 pounds (11,794–14,969 kg).
Class 8	Heavy-duty vehicles with a GVWR of 33,001 pounds (14,969 kg) or more.
Commercial Use	For the purposes of this Program, **"commercial use"** refers to the utilization of an Eligible Vehicle by an Eligible Customer (entity, business, public or government agency, nonprofit organization, etc.) to carry people, property, or hazardous materials. Buses and vehicles not meant for on-road use (such as terminal tractors and yard spotters) are **not** included.
Customer/ Customer Entity	For the purposes of this Program, **"customer"** refers to an individual or authorized representative(s) of an organization ("customer entity") who has the authority to purchase or lease eligible goods or services. **"Eligible Customer"** refers specifically to individuals and/or customer entities that meet all Program eligibility requirements.
Customer Delivery Acknowledgment	An official Program document available on the Program Website that must be signed by the customer and uploaded by a Participating Retailer during **Phase 2** Claim submission. It is required for reimbursement (see Claims Process for more information on phases and required documents). It acknowledges delivery of the vehicle(s), states that the Reward has been applied as a reduction of the purchase or lease price, specifies the Reward amount, and affirms that the transaction is complete.
Customer Terms and Conditions Agreement	An official Program document available on the Program Website that must be completed and signed by the customer and uploaded by a Participating Retailer during the **Phase 1** Claim submission. It is required for Phase 1 approval and claim reimbursement (see Claims Process for more information on phases and required documents). By signing the Customer Terms and Conditions Agreement, Eligible Customer(s) agree to abide by the terms stated therein.

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or email info@cleanfuelreward.com
cleanfuelreward.com

TERM	DEFINITION
Customer Information	For the purposes of this Program, **"customer information"** refers to information provided by an Eligible Customer to the Participating Retailer pursuant to the Program and/or the purchase or lease of one or more Eligible Vehicles. This includes the Eligible Customer's business name, business address, business phone, business email address, and business website. Customer information is exclusively information that has been made available, or can be obtained by, legal means (it is not personal information subject to data protection laws).
Data Protection Laws	The applicable laws relating to the handling or processing of personal information, including but not limited to the California Consumer Privacy Act (Cal. Civ. Code § 1798.100 et seq.) and regulations issued thereunder.
DMV	For the purposes of this Program, **"DMV"** refers to the California Department of Motor Vehicles.
DOT	Acronym for the U.S. Department of Transportation, a federal agency responsible for developing and enforcing transportation policies. DOT provides classification systems for vehicles, including GVWR and vehicle class categories; as well as classification systems that distinguish between vehicles intended for use on public roads and highways and vehicles not intended for on-road use, such as terminal tractors and yard spotters.
EDU	Electric Distribution Utility. An entity that owns or operates an electrical distribution system, including a public utility as defined in the Public Utilities Code section 216 (referred to as an Investor-Owned Utility, or IOU); or a local Publicly-Owned Electric Utility (POU) as defined in Public Utilities Code section 224.3; or an Electrical Cooperative (COOP) as defined in Public Utilities Code section 2776.
Eligible Customer(s)	For the purposes of this Program, **"Eligible Customers"** are entities (businesses, public or government agencies, nonprofit organizations, etc.), or authorized representatives thereof, that meet all Program requirements. **For Class 3–8 Eligible Vehicles:** Eligible Customers include private or public corporations/businesses, public or governmental agencies, or non-profit organizations. **For Class 2b Eligible Vehicles only:** Eligible Customers are solely entities operating public fleets subject to the **ACF Rule**; no private businesses or entities may qualify. See Eligibility and Program Rules for more information.

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Questions? Contact Program Headquarters at **800-880-0320**
8:00 a.m.–5:00 p.m. PT, Mon–Fri (excluding holidays)
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TERM	DEFINITION
Eligible Retailer(s)	Vehicle sellers that meet all requirements for Program enrollment but are not yet Participating Retailers. See Eligibility and Program Rules for more information.
Eligible Vehicle(s)	Vehicle(s) meeting all criteria identified for Program eligibility. See Eligibility and Program Rules for more information.
Enrollment Application	An online Program application form must be completed and submitted by Retailers that wish to participate in the Program. Only Participating Retailers (**Eligible Retailers** whose **Enrollment Application** has been submitted and approved by the Program Implementer and who have executed the Participating Retailer Agreement) are authorized to provide the California Clean Fuel Reward to customers and submit claims for reimbursement. See Retailer Enrollment for more information.
GVWR	Gross Vehicle Weight Rating. The maximum total weight a vehicle is engineered to safely carry. GVWR is used to determine a vehicle's class. Not to be confused with Gross Vehicle Weight (GVW), which refers to the total weight of a vehicle at any moment and does not govern class ratings.
Guide for Licensed Vehicle Dealers and Lessor-Retailers	An official **California Department of Motor Vehicles (DMV)** manual that explains the legal, licensing, and operational requirements for businesses engaged in selling or leasing motor vehicles that functions as a regulatory bridge between **California Vehicle Code** law and day-to-day retailer operations. See dmv.ca.gov/portal/file/guide-for-licensed-vehicle-dealers-and-lessor-retailers-pdf/ for the latest version.
LCFS	Low Carbon Fuel Standard. A program established in California and administered by the **California Air Resources Board** (CARB). The California Clean Fuel Reward is funded by LCFS holdback credit funds.
MDHD	Medium-duty/Heavy-duty; Class 2b–8 vehicles.
New Vehicle(s)	For the purposes of this Program, a vehicle with 7,500 miles or less that has not been previously owned or leased by a customer. Only new vehicles can be eligible for the California Clean Fuel Reward; pre-owned vehicles are ineligible, regardless of mileage. Vehicle Identification Numbers (VINs) can only be claimed once.

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TERM	DEFINITION
On-Road	For the purposes of this Program, **"on-road"** refers to vehicles designed and intended for operation on public roads and highways, and compliant with corresponding U.S. **DOT** requirements. Only DOT-compliant, on-road vehicles are eligible for the California Clean Fuel Reward. Vehicles not intended or classified as compliant for on-road use (terminal tractors, yard spotters, reach stackers, etc.) are not eligible.
Participating EDU(s)	Electric distribution utilities engaged as participating members of the California Clean Fuel Reward.
Participating Retailer Agreement	An official Program document required for enrollment. It outlines specific requirements for Participating Retailers. Once enrolled, Participating Retailers are required to abide by the most current version of the Participating Retailer Agreement posted on the Program Website. A signed copy of this document must be uploaded as part of the Enrollment Application. See the Retailer Enrollment section for more information.
Participating Retailer(s)/ Program Participating Retailer(s)	Sellers or lessors of eligible vehicles that have executed the Participating Retailer Agreement and have been approved by the Program Implementer to be eligible for the Program. Only Participating Retailers can offer the California Clean Fuel Reward to customers. See the Overview of the Retailer's Role and Retailer Enrollment for more information.
Participating Retailer Affiliate(s)	Any entity that directly or indirectly controls, is controlled by, or is under common control with a Participating Retailer, including related dealer groups, parent companies, subsidiaries, and/or commonly owned locations. For the purposes of this Program, Participating Retailer Affiliates are treated as associated with the Participating Retailer when engaging in Program-related activities, and are subject to the same eligibility, compliance, and operational requirements.
Personal Information	Information provided by a customer or in possession of the Participating Retailer pursuant to the Program constituting "personal information" under the **Data Protection Laws**. Distinct from **customer information,** which broadly refers to information that is legally and publicly available.
Personal Information Breach	The accidental or unlawful accessing, disclosure, loss, alteration, or destruction of personal information. Also applies to business, service provider, and consumer information.

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TERM	DEFINITION
Phase 1	For the purposes of this Program, **"Phase 1"** refers to the first of two phases of the claim submission process. From a Participating Retailer's perspective, Phase 1 begins early in the sales process. A Phase 1 Claim is typically submitted after the initial purchase or lease, when VINs are available and delivery is expected within 180 days. Participating Retailers are required to validate customer and vehicle eligibility, gather required information and documents, and then create and submit a Phase 1 Claim via the Retailer Portal. The Program Implementer then reviews and validates the Phase 1 Claim. Upon Phase 1 approval, funds associated with that claim are reserved for 180 calendar days. See Claims Process for more information.
Phase 2	For the purposes of this Program, **"Phase 2"** refers to the second of two phases of the claim submission process. From a Participating Retailer's perspective, Phase 2 can be seen as taking place after delivery. Participating Retailers verify that all Phase 1 information remains accurate, gather the required Phase 2 information and documents, and then create and submit a Phase 2 Claim via the Retailer Portal. The Program Implementer then reviews and validates the Phase 2 Claim. Upon Phase 2 approval, the Participating Retailer is reimbursed by Automated Clearing House (ACH) transfer. See Claims Process for more information.
Processing	Operation(s), automated or otherwise, performed on data, such as collection, review, recording, organization, structuring, storage, adaptation or alteration, retrieval, consultation, use, disclosure, dissemination, or otherwise making available, alignment or combination, restriction, erasure, or destruction.
Program	Refers to the California Clean Fuel Reward. "CCFR" may appear in place of the full Program name in some instances.
Program Administrator	Southern California Edison **(SCE)** is the Program Administrator for the California Clean Fuel Reward.
Program Document(s)	Any and all documents related to the Program, including but not limited to the Program Guide, the Participating Retailer Agreement, Enrollment Application, the Customer Terms and Conditions Agreement, Customer Delivery Acknowledgment, and any and all other present and future ancillary and related documents.

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TERM	DEFINITION
Program Enrollment Date	The date a retailer's Enrollment Application is approved by the Program Implementer. Applicants become Participating Retailers on their respective Program Enrollment Dates.
Program Implementer	Maritz Motivation Inc. (or "Maritz"), a Missouri corporation, is the Program Implementer managing the California Clean Fuel Reward on behalf of **CARB** and **SCE**.
Program Launch Date	Late June 2026.
Program Website	cleanfuelreward.com. The Program's official online presence, containing Program information, documents, resources, and a secure Retailer Portal for Participating Retailers.
Public Fleet(s)	For the purposes of this Program, **"public fleet"** refers to a vehicle fleet operated solely by entities subject to the ACF Rule, including: all federal, state, city, and other government fleets, public universities and schools/school districts, public ports/airports, and public special districts such as water, utility, and irrigation districts. Only public fleets are eligible to receive the California Clean Fuel Reward for Class 2b Eligible Vehicles. Private entities are not eligible. See Eligibility and Program Rules for more information.
Purchase/Lease Agreement or Sales Contract	A legally binding document setting forth the material terms of a vehicle transaction between a retailer and customer. It identifies the vehicle(s) involved in the transaction, purchase price or lease terms, taxes and fees, delivery conditions, warranties, disclosures, and the rights and obligations of each party. Exact format and content may vary from retailer to retailer. Must be uploaded by a Participating Retailer during the claim submission process and must *explicitly* call out the California Clean Fuel Reward and the Reward amount as a reduction of the total price, excluding taxes and fees, as its own line item. Name(s) and amount(s) of other rebate/incentive program(s) stacked with the California Clean Fuel Reward, if applicable, must be identified separately. May be described using terms such as "Purchase Order," "P.O.", "Purchase Agreement," "Sales/Lease Agreement," etc.

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TERM	DEFINITION
Required Document(s)/ Required Documentation	Any and all documents related to the transaction (purchase or lease) of an Eligible Vehicle that must be attached to a Phase 1 and/or Phase 2 Claim by the Participating Retailer and uploaded as part of the claim submission. Required document(s) must include all required information, declarations, and disclosures, and be signed and dated by the customer and any other specified stakeholders. Required documents can be considered a subset of **Program Documents**, and include, but may not be limited to, the Customer Terms and Conditions Agreement, the Customer Delivery Acknowledgment, and the Purchase/Lease Agreement or Sales Contract. Customer information must match on all required documents and all corresponding fields on Phase 1 and Phase 2 Claim forms.
Retailer Portal	A secure online area of the California Clean Fuel Reward Program Website where Participating Retailers can create and manage claims, track current funding levels, view Program announcements and access training resources.
Reward or "Program Reward"	For the purposes of this Program, the **"Reward"** is an amount of money paid by the California Clean Fuel Reward to the Participating Retailer for the benefit of the Customer to offset some portion of the cost of an eligible vehicle. The Reward is applied at the time of sale and reimbursed to the Participating Retailer upon final claim approval. Only one Reward may be applied per unique eligible VIN.
SCE	Southern California Edison. SCE is a California-based Electric Distribution Utility (EDU) and Program Administrator for the California Clean Fuel Reward.
Service Provider	For the purposes of this Program, a **"service provider"** is an entity that performs services or functions on behalf of another organization, supporting program administration or implementation. In the context of the California Clean Fuel Reward, the Program Implementer is a service provider of the Program Administrator; the Participating Retailer is a service provider of the Program Implementer.

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TERM	DEFINITION
Stacking	For the purposes of this Program, **“stacking”** refers to combining the California Clean Fuel Reward with other compatible rebates, rewards, and incentives, as applicable, to maximize cost reduction for the customer. Limitations and eligibility requirements vary by program. The combined total reduction of all programs, inclusive of the California Clean Fuel Reward, cannot exceed 90% of the purchase or lease price of a vehicle, excluding taxes and fees. See Reward Details for more information.
Third Party	For the purposes of this Program, a **“third party”** refers to an entity (a “third-party broker”) who intends to immediately sell or lease an eligible vehicle to another (the “ultimate customer”) and commits to passing the Reward to the ultimate customer.
Transaction Date	For the purposes of this Program, **“transaction date”** refers to the date of sale or lease; that is, the date on which the preliminary Purchase Order and/or final Purchase/Lease Agreement was signed by the customer.
Ultimate Customer	For the purposes of this Program, the **“ultimate customer”** refers to an eligible entity that is purchasing or leasing an Eligible Vehicle from a **third-party** broker. The ultimate customer receives the Reward and is bound by the Customer Terms and Conditions Agreement.
User	For the purposes of this Program, **“user”** refers to one of two account types available to Participating Retailers on the California Clean Fuel Reward Retailer Portal. Users have fewer permissions than **admin**-level accounts. Each Participating Retailer may have up to two admin accounts and ten user accounts on the Retailer Portal.
Vehicle Manufacturer	An entity that designs, engineers, assembles, and/or produces motor vehicles for sale or lease; also referred to as an original equipment manufacturer (OEM). For the purposes of this Program, **“vehicle manufacturer”** refers to OEMs that produce medium- and heavy-duty (Class 2b–8) BEVs for commercial operations.
VIN	Vehicle Identification Number. A unique 17-character code assigned to a vehicle at the time of manufacture. Only one Reward is allowed per unique eligible VIN.
ZEV	Zero-emission vehicle(s). Any vehicle that emits no exhaust gas or other pollutants during normal operation. A battery-electric vehicle (BEV) is a type of ZEV.

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RETAILER SUPPORT AND COMMUNICATION

We are committed to delivering a seamless, successful Program experience for Participating Retailers and customers. If you have questions or need help, our Support Team is staffed with trained professionals ready to provide answers and support.

California Clean Fuel Reward Program Headquarters
8:00 a.m.–5:00 p.m. PT, Mon–Fri (excluding holidays)
Phone: 800-880-0320
Email: info@cleanfuelreward.com

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REWARD DETAILS

This section covers California Clean Fuel Reward amounts and compatibility (“stacking”) with other incentive, rebate, and financing programs.

Reward Amount by Vehicle Class

The Reward amount varies by vehicle weight class and is deducted from the purchase or lease price at the time of sale.

The combination of any and all rewards and incentives applied to an individual vehicle, inclusive of the California Clean Fuel Reward, cannot exceed 90% of the vehicle’s price, excluding taxes and fees.

Class 2b*	Class 3–4	Class 5	Class 6–7	Class 8
8,501–10,000 lbs.	10,001–16,000 lbs.	16,001–19,500 lbs.	19,501–33,000 lbs.	>33,000 lbs.
$7,500*	$15,000	$60,000	$85,000	$120,000

**Class 2b Reward is only available to public fleets subject to the ACF Rule.*

Note: Buses and vehicles not intended for on-road use (terminal tractors, yard spotters, etc.) are not eligible for the California Clean Fuel Reward.

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Stacking with Other Programs

The California Clean Fuel Reward may be combined ("stacked") with certain other state and local rebates, rewards, and/or incentives, as applicable, subject to respective program rules. **IMPORTANT**: Customers are solely responsible for determining program compatibility and ensuring all applicable program requirements are met. Refer to the respective program guides of other potentially compatible incentive/rebate programs for information on their rules and requirements. The California Clean Fuel Reward is not responsible for preventing incompatible program stacking and cannot provide guidance or support for other programs.

This table shows the California Clean Fuel Reward's potential compatibility with selected other California incentive and loan programs, as of May 2026:

PROGRAM	CLASS 2b‡–7	CLASS 8
California Clean Truck and Bus Voucher Incentive Project (HVIP)*	✗	✓
Carl Moyer Memorial Air Quality Standards Attainment Program*	✓	✓
CARB Truck Loan Assistance Program*	✓	✓
Local Utility-Funded Truck Incentive Programs*†	✓	✓
Other Port, Local, Regional, and/or State Incentives*†	✓	✓

This list is not intended to be comprehensive. Compatibility of other programs with the California Clean Fuel Reward is based on current rules for each respective program. Compatibility rules for other programs are subject to change without notice. Refer to the respective program guides of other potentially compatible incentive/rebate programs for detailed information.

**Excluding buses and vehicles not intended for on-road use (terminal tractors, spotters, etc.).*

†As applicable.

‡ Class 2b Reward is only available to public fleets subject to the ACF Rule.

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Program Stacking Limits and Controls

- Total stacked incentives and/or price reduction for each eligible vehicle shall not exceed 90% of the total vehicle cost per eligible VIN, excluding taxes and fees. The California Clean Fuel Reward should be applied first.
- The California Clean Fuel Reward may only be applied once per unique eligible VIN.
- All sources (or potential sources) of co-funding must be disclosed, and their amounts itemized, on the Purchase Order, Purchase/Lease Agreement, Sales Contract, and/or Lease Agreement documentation attached to the corresponding claim.
- Accepting the California Clean Fuel Reward could invalidate eligibility for other rebates, rewards, or incentives, as applicable.
- Stacking and program compatibility requirements and guidelines may be modified at any time, without notice. All final decisions concerning the ability to stack the California Clean Fuel Reward with other programs are at the discretion of the administrators of the applicable programs.
- Applicant information, such as VINs, may be shared with other statewide and local incentive programs to aid in application review and eligibility determination. Customers must agree to the terms and conditions that permit such data sharing.

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ELIGIBILITY AND PROGRAM RULES

Vehicle and Customer Eligibility

Reward amount and customer eligibility vary by vehicle class:

<table>
<tr><th>VEHICLE CLASS</th><th>REWARD AMOUNT*</th><th>CUSTOMER ELIGIBILITY</th><th>VEHICLE ELIGIBILITY</th></tr>
<tr><td>Class 2b</td><td>$7,500</td><td>Reward for Class 2b Eligible Vehicles is only available to public fleets subject to the Advanced Clean Fleets (ACF) Rule, including:
• Government fleets
• Public universities, schools, and school districts
• Public ports and airports
• Public special districts (water, utility, etc.)
Private entities of any kind are not eligible to receive the Reward for Class 2b vehicles.</td><td rowspan="5">Eligible Vehicles must be:
• Battery-electric
• Class 2b (8,501–10,000 lb. GVWR) vehicle(s) are only eligible when purchased or leased by a public fleet subject to the ACF Rule, as detailed in the Customer Eligibility column.
• Class 3–Class 8 (10,001–33,000+ lb. GVWR)
• For commercial operations: to carry people, property, or hazardous materials
• Purchased or leased new (7,500 miles or less; not previously owned/leased by a customer)
• Acquired from a Program Participating Retailer
Ineligible vehicle types:
• Buses and vehicles not intended for on-road use (terminal tractors, yard spotters, etc.)
• Vehicles with 7,500 miles or more
• Pre-owned/leased vehicles, regardless of mileage
• New or used hybrid, fuel cell, ePTO, and other zero-emission vehicles; ZEV conversions, battery-electric motorcycles</td></tr>
<tr><td>Class 3–4</td><td>$15,000</td><td rowspan="4">Reward for Class 3–8 Eligible Vehicles is available to public or private entities, including:
• Corporations and businesses
• Non-profit organizations
• Public or private universities, schools, and school districts
• Public or private ports/airports
• Government agencies in California
• Public or private utilities and special districts</td></tr>
<tr><td>Class 5</td><td>$60,000</td></tr>
<tr><td>Class 6–7</td><td>$85,000</td></tr>
<tr><td>Class 8</td><td>$120,000</td></tr>
</table>

Additional Program rules and eligibility restrictions may apply.

* *The total amount of all rewards, inclusive of the California Clean Fuel Reward, cannot exceed 90% of the price of the vehicle, excluding taxes and fees.*

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Additional Customer Requirements

In addition to the requirements described above, Eligible Customer(s) must:

- Have a physical business location at the address provided to the Participating Retailer in the vehicle Purchase/Lease Agreement.
- Provide accurate customer information (organization/business name, address, phone number, email address; name, contact information; and name, contact information, and signature of authorized representative, if applicable) as needed for the transaction.
  - Customer information, including signatures, used on the claim must match the information and signatures on the required Program Documents.
- Take delivery of the vehicle(s) within 180 calendar days of the Phase 1 Claim approval date (Phase 1 Claim submitted by the Participating Retailer; see Claims Process).
- Maintain active California registration and active ownership/lease agreement for at least three (3) years.
- Agree to meet all obligations and requirements described in the Customer Terms and Conditions Agreement.

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Additional Program Rules

- **Vehicle(s) must be registered in the State of California**. A valid California DMV registration (or an application for registration) is required at delivery and must be uploaded as part of the Phase 2 Claim submission.
- **Primary Use in California:** The majority of a vehicle's commercial operations, as described above, must be in the state of California. The customer may use their vehicle(s) outside of California for **no more than 50%** of the vehicle's utilization during the first three years.
- Eligible Vehicles must be purchased or leased from an enrolled Program Participating Retailer (A list of Participating Retailers is available on the Program Website).
- Eligible Vehicles must have a valid VIN.
  - VIN(s) must be provided within 180 calendar days of Phase 1 Claim approval.
  - The Reward can only be applied once per unique VIN.
- There is no current limit on the number of Rewards per Eligible Customer for Eligible Vehicles with unique VINs (Eligible Customer may receive the Reward for each Eligible Vehicle purchased or leased).

Customer responsibilities are set forth in the Customer Terms and Conditions Agreement, which must be signed by the customer and uploaded by the Participating Retailer as part of the Phase 1 Claim submission (see Claims Process for more information).

The Program Administrator and Program Implementer retain sole discretion to interpret, apply, and enforce Program rules and requirements.

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Retailer Eligibility

To qualify as a Participating Retailer, the following requirements must be met:

- Sell or lease new (7,500 miles or less, not previously owned or leased by a customer), Program-eligible Class 2b–8 BEVs
- Be located and licensed to operate in the United States (U.S.-based retailers outside of California are eligible to participate)
- Have a valid State Business Entity Number and EIN/Tax ID
- Have a valid California Tax Resale Permit Number (must be a CA Permit Number)
- Have a valid Retailer's/Dealer's License Number
- Retailers are required to upload a copy of the Participating Retailer Agreement, signed by an authorized representative of the retailer.
  - Upon execution of the Participating Retailer Agreement and approval for enrollment in the Program, the Participating Retailer enters into a legally binding agreement and agrees to comply with all terms and conditions set forth in the Participating Retailer Agreement, which shall be enforceable by the Program Administrator and/or the Program Implementer.

Retailers must also provide banking information and some additional business documentation with their Enrollment Application. See Retailer Enrollment for more information and a step-by-step enrollment guide.

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PROGRAM BUDGET AND FUNDING

The California Clean Fuel Reward is funded through California's Low-Carbon Fuel Standard (LCFS). This Program is not funded by customer or ratepayer dollars.

The Program Administrator plans to continue releasing funds beyond 2028.

Funding Windows

To ensure the continued availability of funds throughout the life of the Program, Rewards are allocated to Funding Windows that open periodically. Up-to-date funding details are available on the Program Website.

Any remaining funds at the end of a Funding Window automatically roll forward into a future Funding Window, assigned to a vehicle class group at the Program Administrator's discretion. Funds cannot be moved from future Funding Windows into the current one.

Changes to Funding and/or Reward Amount

If the Reward amount(s) or total Program funding changes for any reason, relevant updates will be communicated to Participating Retailers on the Retailer Portal and via email at least 30 calendar days prior to the change taking effect.

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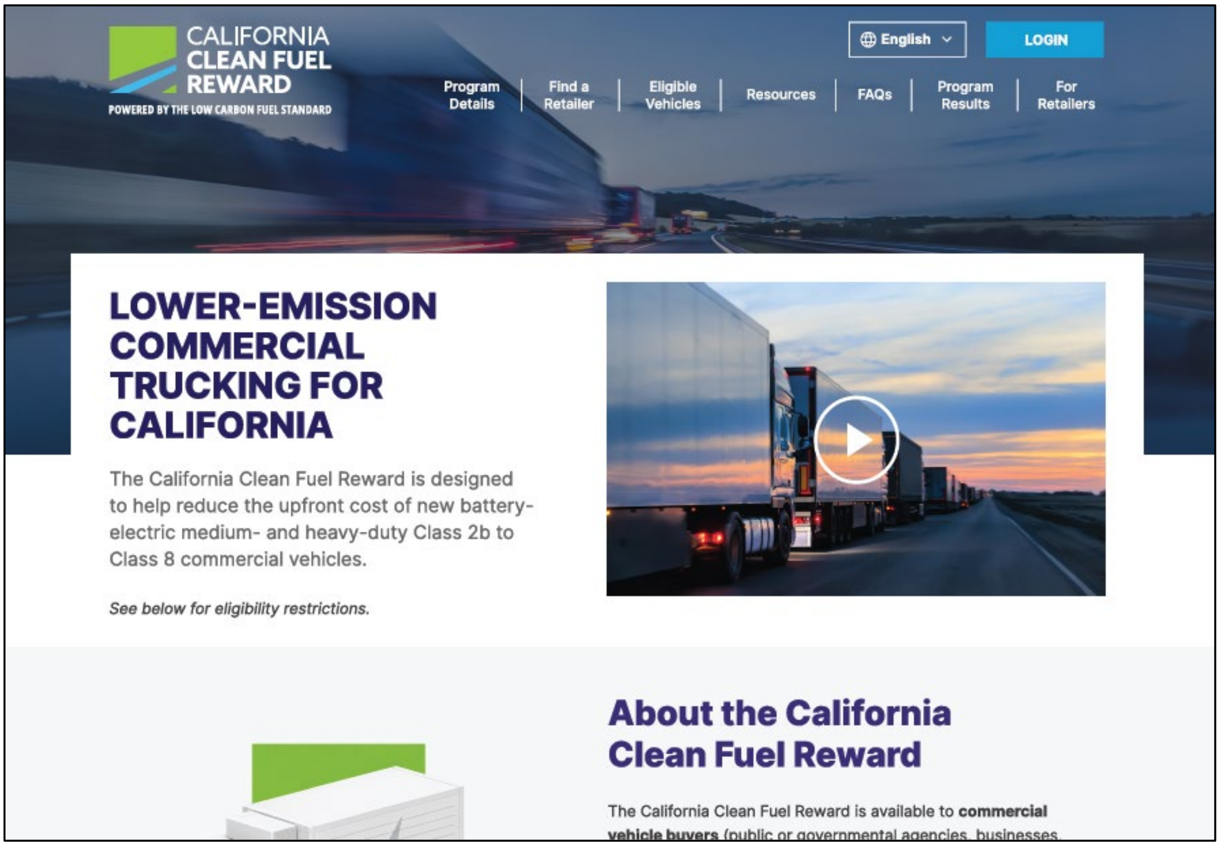
PROGRAM WEBSITE

The Program Website (cleanfuelreward.com) is the most up-to-date source for Program information, including the latest release of this Program Guide. If you have downloaded a copy of the Program Guide, please check the Program Website regularly to ensure you have the most current release.



Program Website home page at cleanfuelreward.com.

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THE PARTICIPATING RETAILER'S ROLE

As a primary conduit for communicating the opportunity to customers, Participating Retailers are key to the California Clean Fuel Reward.

At a high level, a Participating Retailer's role includes the following elements:

- Create an account on the Program Website and submit a completed Enrollment Application and signed Participating Retailer Agreement.
- Verify customer and vehicle eligibility according to Program rules.
- Review Program requirements, the Customer Terms and Conditions Agreement, and other relevant information with Eligible Customers.
- Provide the Reward to customers at the point of sale.
- Collect all required customer/business, vehicle, and purchase/lease information necessary to submit a claim.
- Create and submit reimbursement claim(s) for each customer/transaction using the Retailer Portal on the Program Website.
- Receive reimbursement from the Program for approved claims.

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RETAILER ENROLLMENT

Retailers may enroll at any time during the Program. Only Participating Retailers (retailers that have submitted an Enrollment Application and have been approved by the Program Implementer) may offer the California Clean Fuel Reward.

Claims for transactions occurring before a retailer's Enrollment Application is approved and/or prior to the official Program Start Date will not be reimbursed.

Retailers complete a simple online application to enroll in the Program, providing basic company and contact information, bank account information for reimbursement, and a signed copy of the Participating Retailer Agreement. Once the Enrollment Application is reviewed and approved, the applicant will become a Program Participating Retailer and will be able to offer the California Clean Fuel Reward to Eligible Customers. Application processing time may vary based on current volume, completeness and accuracy of provided information, retailer responsiveness, and other factors.

Before Starting an Enrollment Application

To expedite the application process, applicants should gather the following required materials in advance:

- State Business Entity Number
- California Tax Resale Permit Number (must be a CA Permit Number)
- Retailer's/Dealer's License Number
- EIN/Tax ID
- Completed W-9:
  - The Program Implementer will issue a 1099 to the Participating Retailer with respect to any reimbursement of Program Rewards, based on the Participating Retailer's tax classification status included in their W-9 submission. 1099s are not sent to any Participating Retailer that is a corporation (including C, S, and LLCs taxed as corporations).
- Business bank account and routing number:
  - A business bank account is required for reimbursement.
  - Checking or Savings accounts **only**; wire transfer or other account types are **not valid** for enrollment.
  - Reimbursements occur via ACH transfer.

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- A **signed** copy of the Participating Retailer Agreement:
  - This document must be signed (digitally or manually) and uploaded with the Enrollment Application.
  - By signing the Participating Retailer Agreement, the applicant agrees to enter into a binding contract, enforceable by the Program Administrator and/or the Program Implementer. Participating Retailers agree to be bound by the most current version of the Participating Retailer Agreement, available on the Program Website.
- Retailer information:
  - Retailer's legal business name
    - Doing Business As (DBA) name, if applicable
  - Address and phone number
  - Name, role/title and contact information of the Primary Business Contact:
    - The Primary Business Contact is assigned an admin account on the Retailer Portal and receives all Program communications (see Advanced Retailer Portal Topics for more information).

Enrolling Your Retailer: Step by Step

Retailers must complete their own Enrollment Applications. The Program Administrator, Implementer, and California Clean Fuel Reward Program Headquarters cannot enroll on a retailer's behalf.

Retailers with multiple locations (including direct-to-customer retailers and retailers that are part of a group) must enroll a single location or member as a "primary" retailer. Once the Enrollment Application is approved, an admin user can enroll additional members or locations using the Retailer Portal. See Adding Additional Retailers to a Group for more information.

Follow these steps to enroll:

1. Visit the Program Website at cleanfuelreward.com.
   a. If you already have an account, log in with your credentials.
   b. Otherwise, select the **Create Account/Login** button, provide the required information, and then click the link in the verification email.
2. Once you are logged in, select the **Enroll** button.

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3. Fill out the Enrollment Application. **All fields are required** unless otherwise specified:
    a. First and last name of the primary business contact for the retailer
    b. Email address of the primary business contact
    c. Role/title of the primary business contact
    d. Mobile phone number of primary business contact
    e. Retailer's legal business name
    f. DBA name (if applicable)
    g. Retailer business phone number
    h. Retailer address, city, state, and ZIP code

4. In the **Vehicle Brands** field, indicate all eligible vehicle brands offered by the retailer (select as many as needed). See Eligibility and Program Rules for information on vehicle eligibility.

5. Complete all required Business Identification and Banking Information fields:
    a. EIN/Tax ID
    b. Retailer's/Dealer's License Number
    c. State Business Entity Number
    d. California Tax Resale Permit Number (must be a CA Permit Number)
    e. Business Website (optional, but recommended; business websites will be included on the California Clean Fuel Reward Participating Retailer List and the **Find a Retailer** tool on the Program Website)
    f. Bank Account Type (must be an **ACH Checking** or **Savings** account; wire transfer and other account types are **not valid**)
    g. Bank Name
    h. Account Holder Name
    i. Routing Number
    j. Account Number

6. In the **Required Documents** section, select **Browse File** and attach:
    a. A **signed** Participating Retailer Agreement (signatures can be digital or manual)
    b. A completed W-9
    c. Any supporting documentation (if requested by the support team)

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7. Review the Enrollment Application to ensure all required fields are completed, and all information is accurate.
8. Agree to the veracity/accuracy certification by placing a check mark in the corresponding box.
9. Double-check your application one more time, then select **Submit Enrollment.**

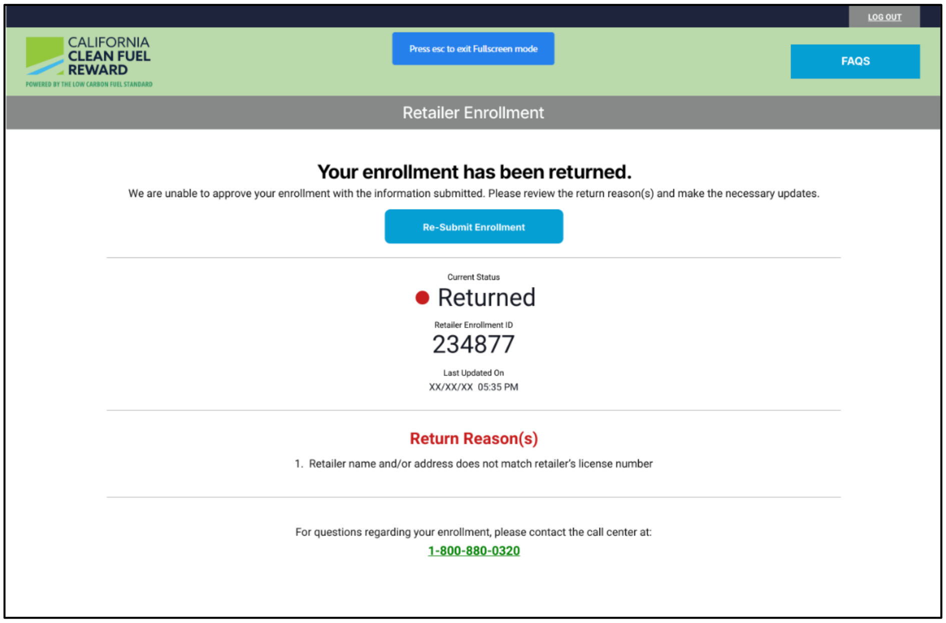
After Submitting Your Application

Once your Enrollment Application has been submitted, an automated confirmation email will be sent to the primary business contact.

Application processing time may vary based on current volume, completeness and accuracy of provided information, retailer responsiveness, and other factors.

Returned Enrollments

If an Enrollment Application cannot be approved as-is, the retailer will be notified by automated email. In most cases, the retailer can correct the issue(s) and resubmit.



Example of a returned Enrollment Application.

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Common Causes of Enrollment Problems

Retailer enrollments are most often delayed or returned when information is missing or incorrect in the Enrollment Application or required documents. The most common enrollment problems to watch out for are:

- **Unsigned (or improperly signed) Participating Retailer Agreement.** The Participating Retailer Agreement is a binding contract that must be signed by an authorized retailer representative and attached to the Enrollment Application. Documents can be signed digitally or manually.
- **Incorrect or missing business identification information.** Before submitting your application, double-check the following information:
  - EIN/Tax ID
  - Retailer's/Dealer's License Number
  - State Business Entity Number
  - California Tax Resale Permit Number (must be a CA Permit Number)
- **Listing a retailer's DBA name as its legal business name, or vice versa.** Some organizations do business under a name other than the one under which they are legally incorporated (for example, the National Railroad Transportation Corporation is a legal entity that does business as "Amtrak"). The **Retailer's Legal Business Name** field should include the full legal name of the retailer, while the optional **Doing Business As** field should be completed only if the retailer does business under a different name.
- **Incorrect or missing banking information.** A business bank account is required for reimbursement. Prior to applying, be sure to verify the:
  - Account type (only ACH checking or savings accounts are eligible; do not enter a wire transfer or other account type)
  - Routing number
  - Account number
- **Skipping required fields on the application.** Unless otherwise specified, *all fields* on the Enrollment Application are required.

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CLAIMS PROCESS

The California Clean Fuel Reward can be claimed only once per Eligible Vehicle; however, Eligible Customers who purchase or lease multiple Eligible Vehicles can receive the Reward for each. There is currently no limit to the number of Rewards a single Eligible Customer can receive.

Participating Retailers apply the Reward at the time of sale or lease, then create and submit a **reimbursement claim** via the Retailer Portal on the Program Website.

Two-Phased Process

New commercial vehicle sales and leases, particularly heavy-duty vehicles, are typically not “drive off the lot” transactions. Delivery may take place months after the initial agreement. Because of this, the claims process for the California Clean Fuel Reward is completed in two phases that roughly align with the sales process and post-delivery period.

During Phase 1, the Participating Retailer validates customer and vehicle eligibility for the Reward and gathers and submits required information and documentation as a Phase 1 Claim. Reimbursement funds are reserved for 180 calendar days upon Phase 1 Claim approval.

Between Phase 1 and Phase 2, the Participating Retailer completes all activities necessary to finalize the transaction. VIN(s) must be provided (if they were not provided with the Phase 1 Claim), ***and*** the vehicle(s) must be delivered within 180 calendar days of Phase 1 Claim approval; otherwise, the claim will be rejected and reserved funds released.

Phase 2 occurs after delivery and consists of the Participating Retailer gathering and submitting final elements of the claim for verification by the Program Implementer. Once Phase 2 has been approved, the Participating Retailer is reimbursed.

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Claim Submission Process Overview

START OF SALES PROCESS

1 PHASE 1 Reserve Funds

REQUIREMENTS

1. Verification of vehicle and customer eligibility
2. Preliminary Purchase/Lease Agreement
3. Customer business information
4. Signed Customer Terms and Conditions Agreement

Program Implementer reviews and verifies claim submission. If approved, funds from the current Funding Window are reserved for 180 days from Phase 1 approval date.

FINALIZE TRANSACTION AND DELIVER

Completion of all activities required to finalize sale/lease and deliver vehicle(s):

- Vehicle production complete
- Vehicle transport to delivery destination
- Final sale/lease documents
- Registration paperwork and license plate
- Deliver vehicle(s) to customer

Failure to provide VIN(s) and deliver vehicle(s) within 180 days of Phase 1 approval will result in a rejected claim and release of reserved funds.

AFTER DELIVERY

2 PHASE 2 Retailer Reimbursement

REQUIREMENTS

1. Final invoice: vehicle, make, model, VIN, Reward name and amount
2. Signed Customer Delivery Acknowledgment
3. Proof of registration or registration application
4. Submit claim

Program Implementer reviews and verifies claim submission. If approved, Participating Retailer is reimbursed within approximately 10 business days of Phase 2 approval date.

Claims Involving Third-Party Sales

Participating Retailers can still offer the Reward and receive reimbursement when selling or leasing Eligible Vehicles to an entity that intends to act as a "third-party broker," that is, an entity that intends to immediately sell or lease the vehicle to an end-use customer (the "ultimate customer"), **provided** the third-party broker commits to passing the Reward to the ultimate customer.

Transactions involving a third-party broker require the following during the claims process:

- Confirm the ultimate customer is eligible to receive the Reward.
- Ensure that both the third-party broker and ultimate customer sign the Customer Terms and Conditions Agreement and commit to executing the appropriate responsibilities therein.
- Upload all required documents related to **both** the third-party broker and the ultimate customer when creating and submitting Phase 1 and Phase 2 Claims.
- The ultimate customer's name and address must be included on the California Vehicle registration/title application.

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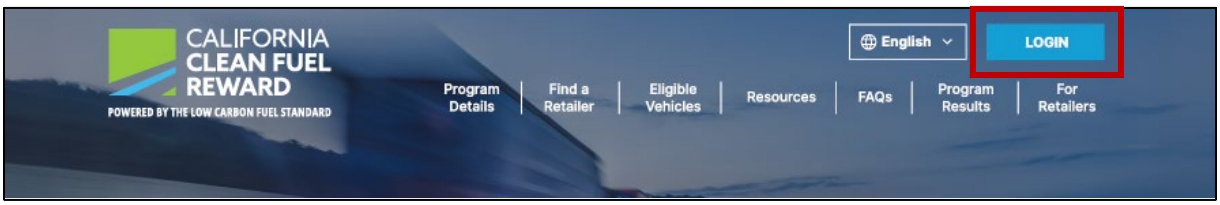
RETAILER PORTAL

Participating Retailers have access to the secure Retailer Portal, where users can create and manage claims, check funding and reimbursement status, review training resources, and more.

Accessing the Retailer Portal

Participating Retailers gain access to the Retailer Portal on approval of their Enrollment Application. To reach the Retailer Portal, visit the Program Website (cleanfuelreward.com) and select the **Log In** button at the top right of the screen:



Then log in by entering the credentials associated with the Participating Retailer's primary business contact. Once logged in, you will be taken directly to the Claims Management Dashboard, the primary hub for Participating Retailer claim activity.

Retailer Portal Overview

Navigate the Retailer Portal using the menu at the top of the screen:

1. Participating Retailer's business name and **Log Out** button.
2. **Claims:** access the **Claims Management Dashboard** to create and manage claims, track available funding, and view retailer-specific metrics.
    a. **Claims → Invoices** (admin only): tools to view and export the Participating Retailer's reimbursement invoices. See Advanced Retailer Portal Topics for more information.

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3. **Program Guidelines:** the latest version of this Program Guide, the Customer Terms and Conditions Agreement, and the Participating Retailer Agreement, all in PDF format.
4. **Marketing:** downloadable copies of the Program Branding and Style Guide and other Program marketing assets.
5. **Training Resources:** instructional materials, job aids, and on-demand videos.
6. **Profile:** user details and Participating Retailer's business information.
    a. **Profile → Profile Management → Retailer Information** (admin only): view and edit Participating Retailer profile, including bank information.
    b. **Profile → Manage Users** (admin only): add, remove, and edit user accounts. See Advanced Retailer Portal Topics for more information.
7. **FAQs:** answers to frequently asked questions.

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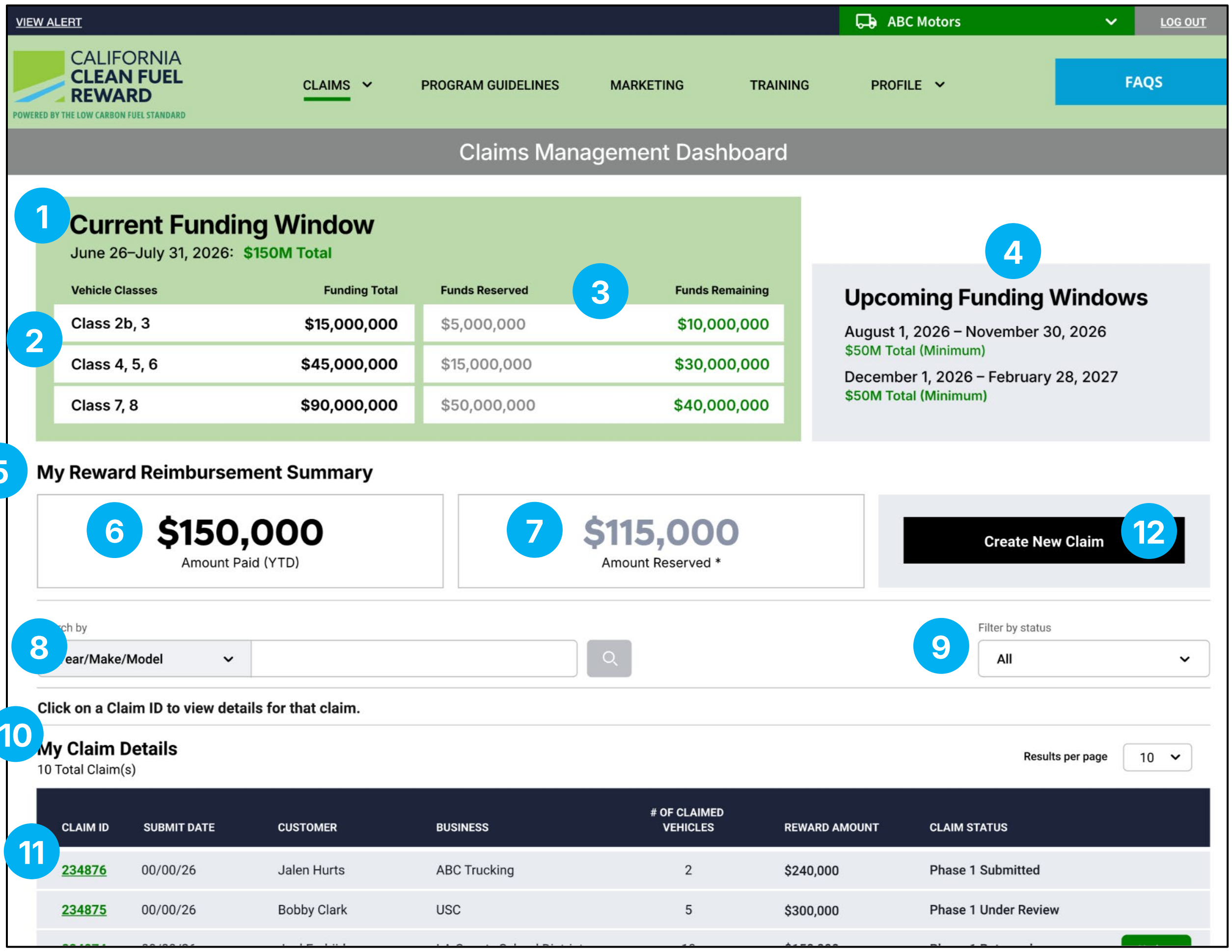
Claims Management Dashboard

Participating Retailers will be taken to their custom **Claims Management Dashboard** upon logging in to the Retailer Portal. This Dashboard serves as the Participating Retailer's functional hub for claims management.



The Claims Management Dashboard on the Retailer Portal.

1. **Current Funding Window**
2. **Funding Total by Vehicle Classes**: the total amount available in the current Funding Window for each vehicle class group.
3. **Funds Reserved** and **Funds Remaining:** detailed breakdown by vehicle class group showing the amount reserved (through approved Phase 1 Claims) and the total remaining funds for this Funding Window.

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4. **Upcoming Funding Windows:** the start dates and minimum total funding amount for the next two Funding Windows. If a current Funding Window closes with funds left over, they automatically roll forward into a future Funding Window, so the minimum amounts shown may increase.
5. **My Reward Reimbursement Summary**
6. **Amount Paid:** total amount paid in reimbursements to this Participating Retailer.
7. **Amount Reserved:** funding held in reserve status based on the Participating Retailer's approved Phase 1 Claims.
8. **Search by**: enables the user to search for specific claims by vehicle year, make, or model.
9. **Filter by**: allows the user to filter existing claims by status.
10. **My Claim Details**
11. **Retailer Claims List**: a list of all the Participating Retailer's claims.
12. **Create New Claim**: start a new Phase 1 Claim.

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CREATING AND SUBMITTING CLAIMS

As described earlier, the claims process for the California Clean Fuel Reward occurs in two phases, during which Participating Retailers verify eligibility, gather, review, and submit required information and relevant Program Documents for each phase. Preparation is key: if everything is ready in advance, submitting Phase 1 and Phase 2 Claims will be simpler.

Training Resources

Participating Retailers should visit the **Training Resources** page on the Retailer Portal to access a library of support materials. The graphic below aligns the available training materials and job aids with Program-related milestones:

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Tips for Success

Applying these techniques will help facilitate the claims process:

- Establish a clear, defined workflow for compiling and managing required information at each phase.
  - Take advantage of the tools in the **Training Resources** section:
    - *Vehicle and Customer Eligibility Checklist:* A comprehensive "go/no-go" eligibility verification tool for use early in the sales process.
    - *Program Stacking Guide*: An overview of common, potentially compatible programs. Eligible Customers might be able to apply for more savings.
    - *Phase 1 Claim Checklist:* An interactive tool to help sales personnel compile required information from Eligible Customers during the sales process.
    - *Claim Status Overview:* A quick reference describing the most common claim statuses, when they occur, and what they mean.
    - On-demand training videos: Short step-by-step guides to key activities and Retailer Portal functionality.
- Understand each phase in detail. Set realistic milestones and prerequisites for key requirements, create a schedule, and follow it rigorously.
  - Don't rush. California Clean Fuel Reward funds are secure, and the Funding Window structure brings additional capital into the system over time. Filing a claim too soon is more likely to cause problems than waiting until all required elements of the transaction are ready.
- Consider putting one or two people with admin accounts in charge of creating and submitting claims.
- Make sure the entire team understands how the process works. The people creating claims will rely on Sales and Finance personnel to verify eligibility and gather required information from customers.

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PHASE 1: RESERVE FUNDS

Phase 1 is about **reserving** funds to cover the Reward applied by the Participating Retailer. Once a Phase 1 Claim is approved, funds from the current Funding Window are set aside. The Participating Retailer is reimbursed after Phase 2 is approved.

That doesn't mean Participating Retailers should race to submit a Phase 1 Claim the instant the customer signs a preliminary Purchase Order. Participating Retailers must complete the transaction *and* deliver vehicle(s) within 180 days of Phase 1 approval.

START OF SALES PROCESS

1 PHASE 1
Reserve Funds

REQUIREMENTS

1. Verification of vehicle and customer eligibility
2. Preliminary Purchase/Lease Agreement
3. Customer business information
4. Signed Customer Terms and Conditions Agreement

Program Implementer reviews and verifies claim submission. If approved, funds from the current Funding Window are reserved for 180 days from Phase 1 approval date.

Before Starting a Phase 1 Claim

Do not start a Phase 1 Claim unless:

- You can deliver the vehicle(s) to your customer in 180 days or less.
- All required data, signatures, and documents are collected, organized, and verified.

Phase 1 Claim Requirements

For Phase 1, "all required data, signatures, and documents" means the following:

- **Customer/business information**: the business and authorized representative's name, contact information, EIN/Tax ID, Business Entity Number, and third-party broker details, if applicable.
  - Use the Phase 1 Claim Checklist to compile and verify this information, ideally before the customer leaves the store.
    - Save a copy with the transaction paperwork and update it as new information becomes available.
    - The checklist will indicate when to start a Phase 1 Claim and serves as a single-source reference for all the required information.

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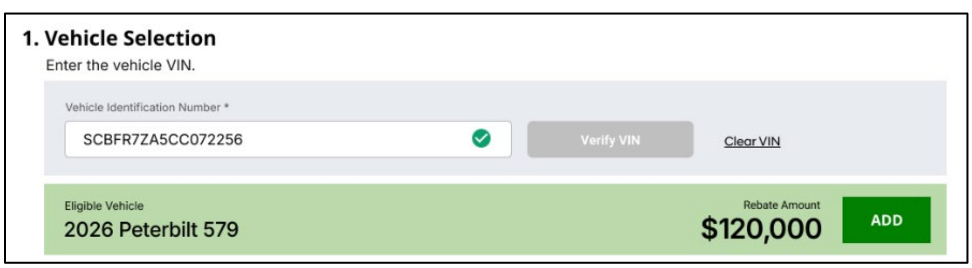
- Retailer's preliminary **Purchase Order/Lease Agreement**, with:
  - A line item for the California Clean Fuel Reward, and the Reward amount.
  - Declaration of any stacked reductions and amounts, if applicable.
  - A digital or manual customer signature.
  - The date the preliminary P.O./Lease Agreement was signed.
- The **Customer Terms and Conditions Agreement**, with:
  - A digital or manual customer signature.
  - The same date as on the P.O./Lease Agreement.

Phase 1: Step by Step

Follow these steps to create and submit a Phase 1 Claim.

1. Go to cleanfuelreward.com and log in to the Retailer Portal.
2. You should be taken to the **Claims Management Dashboard** as soon as you log in.
   a. If not, select **Claims** from the top menu.
3. Select the **Create New Claim** button.
4. You will be asked if you have VIN(s) for the claim. Select a response and **Submit**.
   a. If **Yes:**
      i. On the **Create New Claim** form, enter a VIN and select **Verify VIN.**

      ii. If the VIN matches a Program Eligible Vehicle, the vehicle name and Reward amount will display.
      iii. Select **Add** to add the vehicle to your claim.



Note: *This Program is funded through California's Low Carbon Fuel Standard (LCFS). This Program is not funded by customer or ratepayer dollars.*

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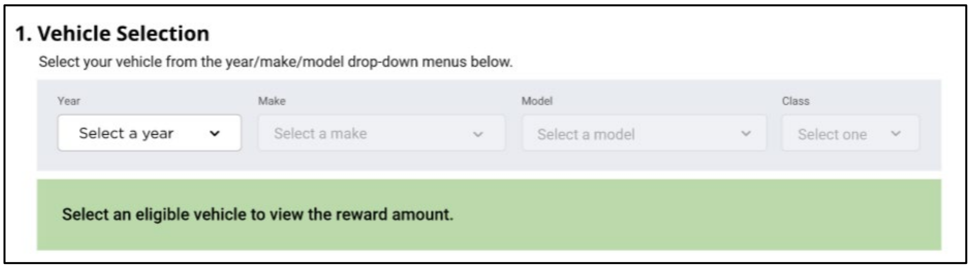
iv. Repeat as needed for additional VINs.

  1. You can add up to 20 VINs to a single claim. If the transaction includes more than 20 VINs, create multiple claims.

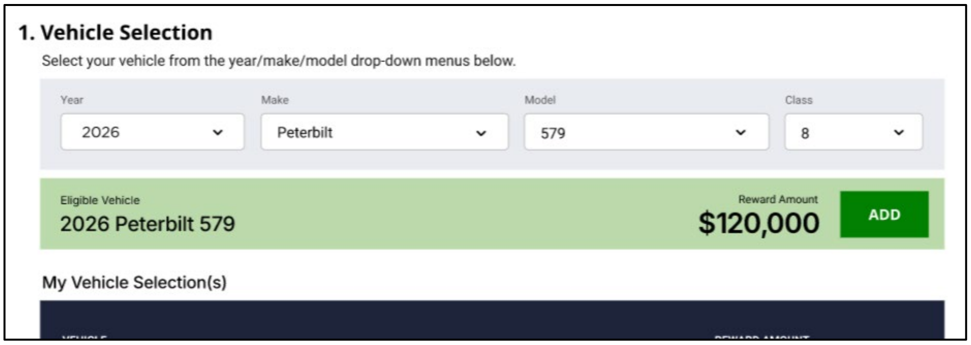
b. If **No:**

As a rule, Participating Retailers **should not submit Phase 1 Claims without VINs**.

i. On the **Create New Claim** form, use the drop-down menus to select the **Year, Make, Model,** and **Class** of the vehicle.



ii. Select **Add** to add the vehicle to the claim.



iii. Repeat as needed for additional vehicles.

  1. You can add up to 20 vehicles to a single claim. If the transaction includes more than 20 vehicles, create multiple claims.

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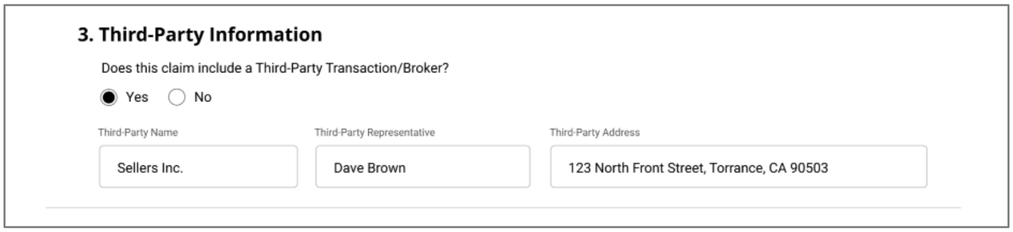
5. The **My Vehicle Selection(s)** section will populate as Eligible Vehicles are added. If desired, select the **Remove** button to remove an associated vehicle:

6. When all Eligible Vehicles have been added, scroll to **2. Customer Business Information** and complete the section. If you prepared a Phase 1 Claim Checklist , use it as a reference.

   a. Eligible Customer's **First Name** and **Last Name.**
   b. **Legal Business Name.**
   c. **Doing Business As** (if applicable).
   d. **Business Entity Type:**
      i. Select **Public, Private, Non-Profit,** or **Unknown** from the drop-down.
   e. **EIN/Tax ID Number.**
   f. **Business Entity Number.**

7. Select **Yes** or **No** to indicate if the claim involves a third-party broker (see Claims Involving Third-Party Sales for more information).
   a. If **Yes,** indicate the **Third-Party Name, Representative,** and **Address**:



   b. These fields will not appear if you select **No**.

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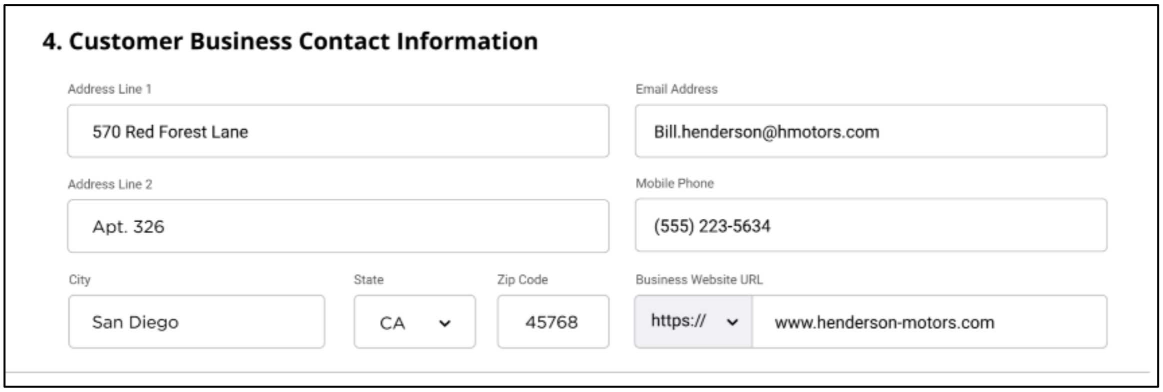
8. Scroll to **4. Customer Business Contact Information** and complete the section:



4. Customer Business Contact Information

Address Line 1: 570 Red Forest Lane
Email Address: Bill.henderson@hmotors.com
Address Line 2: Apt. 326
Mobile Phone: (555) 223-5634
City: San Diego
State: CA
Zip Code: 45768
Business Website URL: https:// www.henderson-motors.com

   a. Business **Address** (the customer must have a physical business location at the address provided).
   b. **City, State,** and **ZIP Code.**
   c. **Email Address** and **Mobile Phone** number of the customer business contact/authorized representative who signed both the preliminary Purchase Order/Lease Agreement and the Customer Terms and Conditions Agreement.
   d. **Business Website URL**.

9. Under **5. Transaction Type**, indicate whether the transaction is a **Sale** or **Lease**:

5. Transaction Type

This transaction will be a:

Sale Lease

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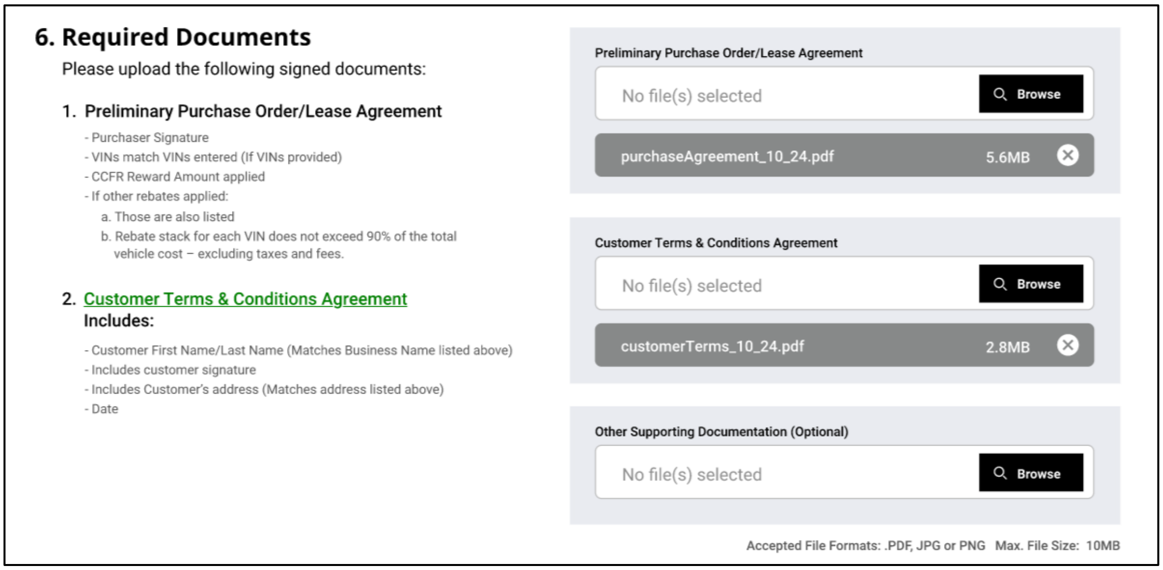
10. In the **6. Required Documents** section: attach the Phase 1 required documents.
    a. Select **Browse** for each item and navigate to the file location to attach it:



    b. The first required document is the Participating Retailer's preliminary **Purchase Order/Lease Agreement,** which must include:
        i. A digital or manual customer signature.
        ii. Date the preliminary P.O./Lease Agreement was completed/signed.
        iii. All VINs (if you have them).
        iv. A line item for the California Clean Fuel Reward, and the Reward amount, indicated as a price reduction for each eligible vehicle.
        v. If the customer is stacking other compatible incentives, list the names and amounts of those programs. (See Stacking with Other Programs for more information).
        vi. Review to verify key information matches on all forms and documents.
    c. Attach the **Customer Terms and Conditions Agreement,** which must include:
        i. Customer/business information (name, address, business contact).
        ii. A digital or manual customer signature.
        iii. Date the preliminary P.O./Lease Agreement was completed/signed.
        iv. Confirm the information on this document matches the others.
    d. You may also attach **Other Supporting Documentation** if you wish.

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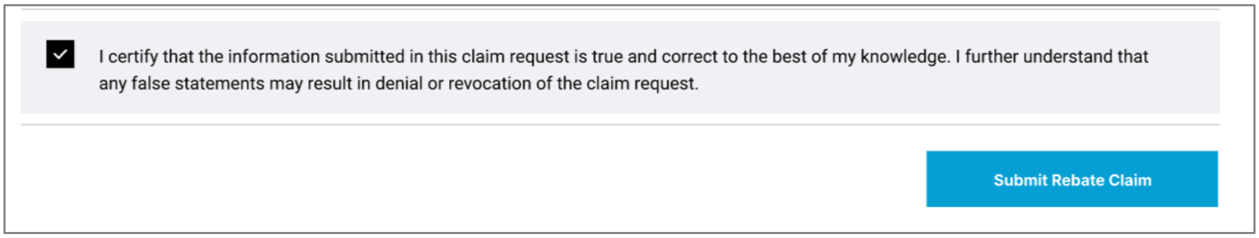
11. Place a check in the box certifying the accuracy and authenticity of all information.
12. Click **Submit Rebate Claim.**



You will receive an automated email indicating that the Phase 1 Claim has been submitted. On the Dashboard, a new claim entry will appear with the status **Submitted**:

My Claim Details
10 Total Claim(s)

Results per page 10

CLAIM ID	SUBMIT DATE	CUSTOMER	BUSINESS	# OF CLAIMED VEHICLES	REWARD AMOUNT	CLAIM STATUS
234876	00/00/26	Jalen Hurts	ABC Trucking	2	$240,000	Phase 1 Submitted
234875	00/00/26	Bobby Clark	USC	5	$300,000	Phase 1 Under Review

You can click on any **Claim ID** to see more details about it. (See Tracking and Managing Claims for more information).

Phase 1 Claim Validation

The **Claim Status** will change to **Under Review** when the Program Implementer starts the validation process. Processing time may be affected by current volume, completeness and accuracy of provided information, retailer responsiveness, and other factors.

Claim Status will be updated again when the review is finished, and the Participating Retailer will be notified via automated email. (see Understanding Claim Status for more information).

- Any status starting with **Approved** indicates the Phase 1 Claim submission has been accepted and the 180-day countdown has begun.
- **Returned** indicates a problem with the claim. The Program Implementer has sent the claim back to the Participating Retailer to fix it.
  - Details will be provided with the automated email message alerting the Participating Retailer that the claim has been **Returned**. See Troubleshooting Common Problems and Working with Active Claims for more information.

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BETWEEN PHASE 1 AND PHASE 2

Phase 1 Claim approval triggers an interim period that is vital for the Participating Retailer, as much work remains to be done before advancing to Phase 2.

FINALIZE TRANSACTION AND DELIVER

Completion of all activities required to finalize sale/lease and deliver vehicle(s):

- Vehicle production complete
- Vehicle transport to delivery destination
- Final sale/lease documents
- Registration paperwork and license plate
- Deliver vehicle(s) to customer

Failure to provide VIN(s) and deliver vehicle(s) within 180 days of Phase 1 approval will result in a rejected claim and release of reserved funds.

What Happens Between Phases

Once a **Phase 1 Claim is approved, the Participating Retailer has 180 calendar days to finalize the transaction and deliver the vehicle(s).** This is a firm deadline; if it is missed, the claim will be **Rejected,** and the reserved funds will be released.

The 180-day limit is designed to allow enough time for Participating Retailers to complete all necessary tasks, while protecting Program funds from being reserved indefinitely for transactions that take longer than expected. This is why Participating Retailers are discouraged from starting Phase 1 Claims too soon. There is no time pressure until Phase 1 is approved, so it is better to delay starting the Phase 1 Claim until the VIN(s) are available and the delivery date is near.

Though not recommended, Phase 1 Claims can be submitted without VIN(s). The same 180 calendar day window applies; the Participating Retailer must also provide VIN(s) during that period. See Tracking and Managing Claims for more information on adding VIN(s) and editing active claims.

Automated Alerts During the 180-Day Period

Program Headquarters will send automated email reminders as the deadline approaches. These reminders are sent on the 170th, 175th and final day of the 180-day window.

Vehicle Delivery

Delivering the vehicle(s) is the last step in the transaction. Make sure that the customer signs the Customer Delivery Acknowledgment during delivery.

- Program rules require that all customer/business information, including signature, match on all required Program Documents and claim forms.
- Since the signatures must be the same, that means the customer representative who signed required documents during Phase 1 must also take delivery and sign for Phase 2. See Troubleshooting Common Problems for more information.

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PHASE 2: RETAILER REIMBURSEMENT

Where Phase 1 was about reserving funds, Phase 2 is about **providing the final pieces of information** and getting reimbursed for the Reward.

AFTER DELIVERY

PHASE 2
2 Retailer Reimbursement

REQUIREMENTS

1. Final invoice: vehicle, make, model, VIN, Reward name and amount
2. Signed Customer Delivery Acknowledgment
3. Proof of registration or registration application
4. Submit claim

Program Implementer reviews and verifies claim submission. If approved, Participating Retailer is reimbursed within approximately 10 business days of Phase 2 approval date.

Phase 2 Claim Requirements

Phase 2 is much simpler than Phase 1. If you have all the required Program Documents in order, the Phase 2 Claim process should only take a few minutes.

- Conduct a final review of customer, vehicle, and transaction information from Phase 1 to verify consistency.
- Gather the required Phase 2 Program Documents and confirm they are accurate and complete:
  - The Participating Retailer's final **Purchase/Lease Agreement,** including:
    - All vehicle(s), including makes, models, and VIN(s).
    - An entry for the California Clean Fuel Reward, and the Reward amount.
    - Names and amounts of any other stacked programs, if applicable.
    - Customer/business information and signature.
    - Final transaction date.
  - A copy of the **California DMV registration** or application for the vehicle(s).
  - A copy of the **Customer Delivery Acknowledgment** signed by the customer.

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Phase 2: Step by Step

Follow these steps to complete Phase 2 of the claims process:

1. Begin by gathering the three required documents listed above and checking them to verify that all information is accurate and consistent.
2. Review the final **Purchase** or **Lease Agreement** to confirm all required information has been captured and matches the customer and business information included in the Phase 1 Claim submission.
    a. Confirm that the VIN(s) on the Purchase/Lease Agreement match those provided for Phase 1.
    b. Verify customer/business information and signature.
    c. Double-check the transaction date.
    d. Remember, the Purchase/Lease Agreement must list the California Clean Fuel Reward and the Reward amount.
    e. Include additional line items for other applicable incentives, rewards, etc.
        i. If stacked with other compatible programs, the California Clean Fuel Reward must be listed first.
        ii. Total reduction may not exceed 90% of the sales price, excluding taxes and fees.
3. Phase 2 also requires a copy of the **California DMV registration** or registration application for any vehicle(s) receiving the Reward.

ACME TRUCKS
1234 State St
Redondo Beach
Phone: (310) 111-5555
Fax: (310) 111-6666
Website:

PURCHASE ORDER
DATE 6/2/2026
PO # 123456
FINAL

CUSTOMER	BROKER
CBS Motors Bill Henderson 570 Red Forest Lane Apt. 326 San Diego, CA 45768 Phone: (555) 223-5634 email: Bill.Henderson@hmotors.com	Sellers Inc Dave Brown 123 North Front Street Torrance, CA 90503

YEAR	MAKE	MODEL	COLOR	VIN
2026	Peterbilt 579	579	White	123496789555556
2026	Peterbilt 579	579	White	123496789555557

DESCRIPTION	QTY	UNIT PRICE	TOTAL
2026 Peterbilt 579	2	$400,000.00	$ 800,000.00
		Fees	$ 10,000.00
		Sales Tax	$ 70,000.00
		License & Title	$ 10,000.00
		Total	**$ 890,000.00**
		California Clean Fuel Reward	$ 240,000.00
		PAY ON DELIVERY	**$ 650,000.00**

BUYER HEREBY AGREES TO ALL TERMS AND CONDISTIONS ASSOCIATED WITH THIS TRANSACTION

PURCHASER AGREES

Bill Henderson	Owner	7/2/2026
SIGNATURE	TITLE	DATE

ACCEPTED BY SELLER

Tom Jones	Sales	7/2/2026
SIGNATURE	TITLE	DATE

Sample Purchase Agreement

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   a. Again, verify customer information and VIN(s) match.

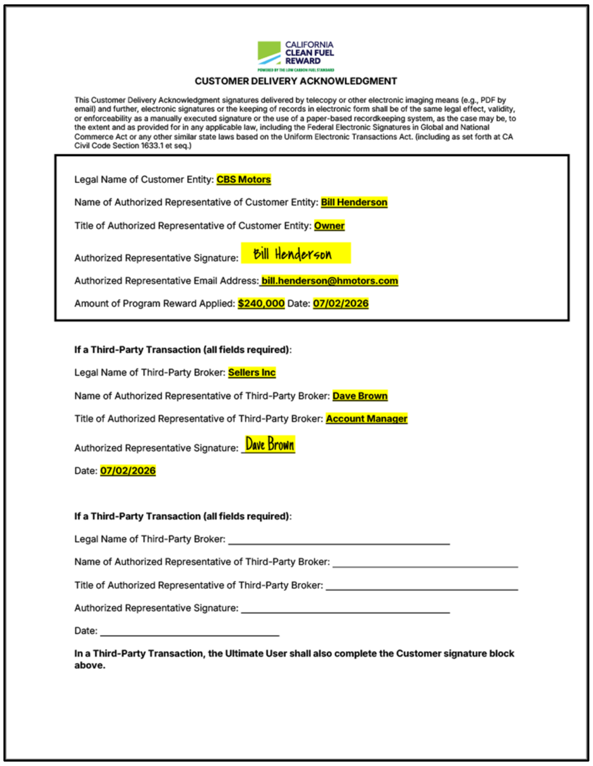
   b. Confirm the registration or application indicates this is a *new* vehicle registration (7,500 miles or less, not previously owned or leased by a customer).

4. The final document required for a Phase 2 Claim is a signed copy of the **Customer Delivery Acknowledgment**:

   a. The *same customer* who signed the Phase 1 documents must take delivery and sign (digitally or manually) the Customer Delivery Acknowledgment.

   b. The date listed must match the date on the final Purchase/Lease Agreement.

5. Once you have all the required documents ready, visit cleanfuelreward.com and log on to the Retailer Portal.


CALIFORNIA CLEAN FUEL REWARD
POWERED BY THE LOW CARBON FUEL STANDARD

CUSTOMER DELIVERY ACKNOWLEDGMENT

This Customer Delivery Acknowledgment signatures delivered by telecopy or other electronic imaging means (e.g., PDF by email) and further, electronic signatures or the keeping of records in electronic form shall be of the same legal effect, validity, or enforceability as a manually executed signature or the use of a paper-based recordkeeping system, as the case may be, to the extent and as provided for in any applicable law, including the Federal Electronic Signatures in Global and National Commerce Act or any other similar state laws based on the Uniform Electronic Transactions Act. (including as set forth at CA Civil Code Section 1633.1 et seq.)

Legal Name of Customer Entity: **CBS Motors**

Name of Authorized Representative of Customer Entity: **Bill Henderson**

Title of Authorized Representative of Customer Entity: **Owner**

Authorized Representative Signature: Bill Henderson

Authorized Representative Email Address: **bill.henderson@hmotors.com**

Amount of Program Reward Applied: **$240,000** Date: **07/02/2026**

If a Third-Party Transaction (all fields required):

Legal Name of Third-Party Broker: **Sellers Inc**

Name of Authorized Representative of Third-Party Broker: **Dave Brown**

Title of Authorized Representative of Third-Party Broker: **Account Manager**

Authorized Representative Signature: Dave Brown

Date: **07/02/2026**

If a Third-Party Transaction (all fields required):

Legal Name of Third-Party Broker: ______________________

Name of Authorized Representative of Third-Party Broker: ______________________

Title of Authorized Representative of Third-Party Broker: ______________________

Authorized Representative Signature: ______________________

Date: ______________________

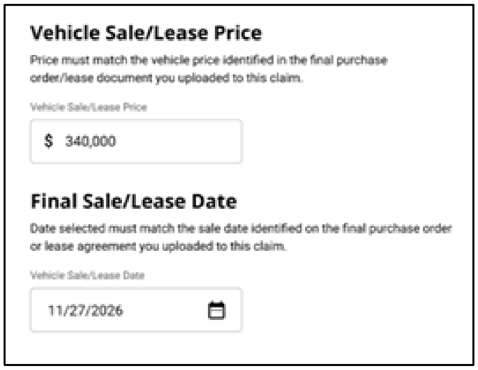
In a Third-Party Transaction, the Ultimate User shall also complete the Customer signature block above.

Sample Customer Delivery Acknowledgment

6. Locate the relevant claim in the **My Claim Details** section of the Claims Management Dashboard.

7. Click the **Claim ID.**

8. On the **Claim Details** page, enter the total **Vehicle Sale/Lease Price** and **Final Sale/Lease Date** in the corresponding fields:



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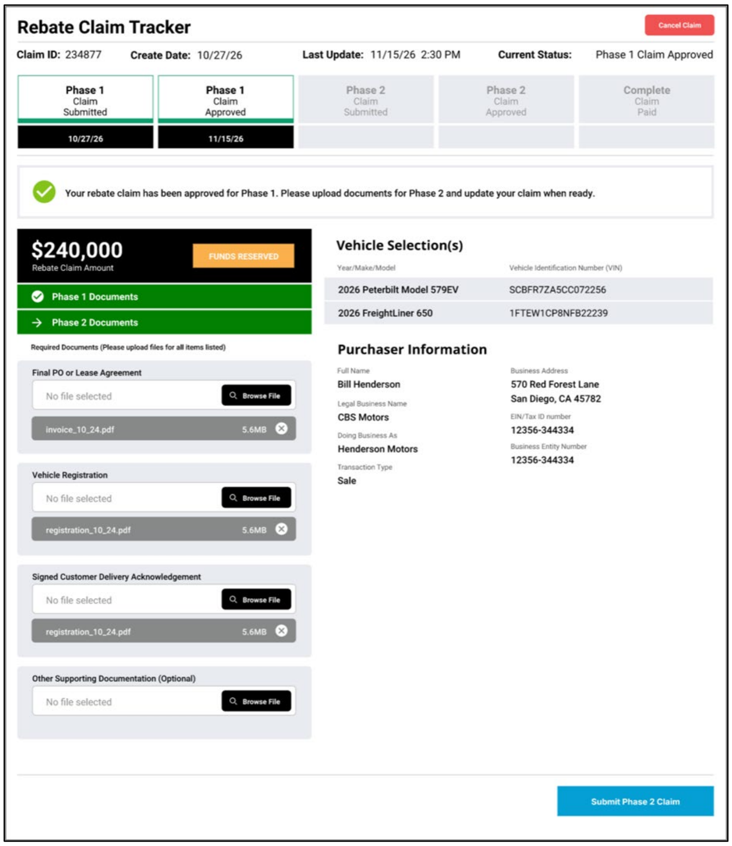
9. Under **Phase 2 Documents**, click the **Browse** buttons, navigate to the appropriate files on your computer, and attach them.
    a. Make sure you upload the correct file for each field.
10. Attach any **Supporting Documentation**, if necessary.
11. Review one last time, then click **Submit Phase 2 Claim.**

You will receive an automated email to let you know the claim has been submitted successfully, and the **Claim Status** will change to **Submitted.**

Phase 2 Claim Validation



The Program Implementer will shortly begin a review of the Phase 2 Claim to verify accuracy, consistency, and eligibility. **Claim Status** will change to **Under Review** when this process begins. Claim processing time may be affected by current volume, completeness and accuracy of provided information, retailer responsiveness, and other factors.

Once the review is complete, the **Claim Status** will be updated, and an automated email will be sent. (see Understanding Claim Status for more information).

- **Approved** indicates the Phase 2 Claim submission has been accepted and the Participating Retailer will receive reimbursement soon.
- **Returned** status indicates there is something wrong with the claim and the Program Implementer has sent it back to the Participating Retailer to fix. The automated email message accompanying the returned claim will include more information about the issue. See Troubleshooting Common Problems and Working with Active Claims for more information.
- **Payment Sent** indicates that reimbursement funds have been extracted for ACH transfer to the Participating Retailer's bank.

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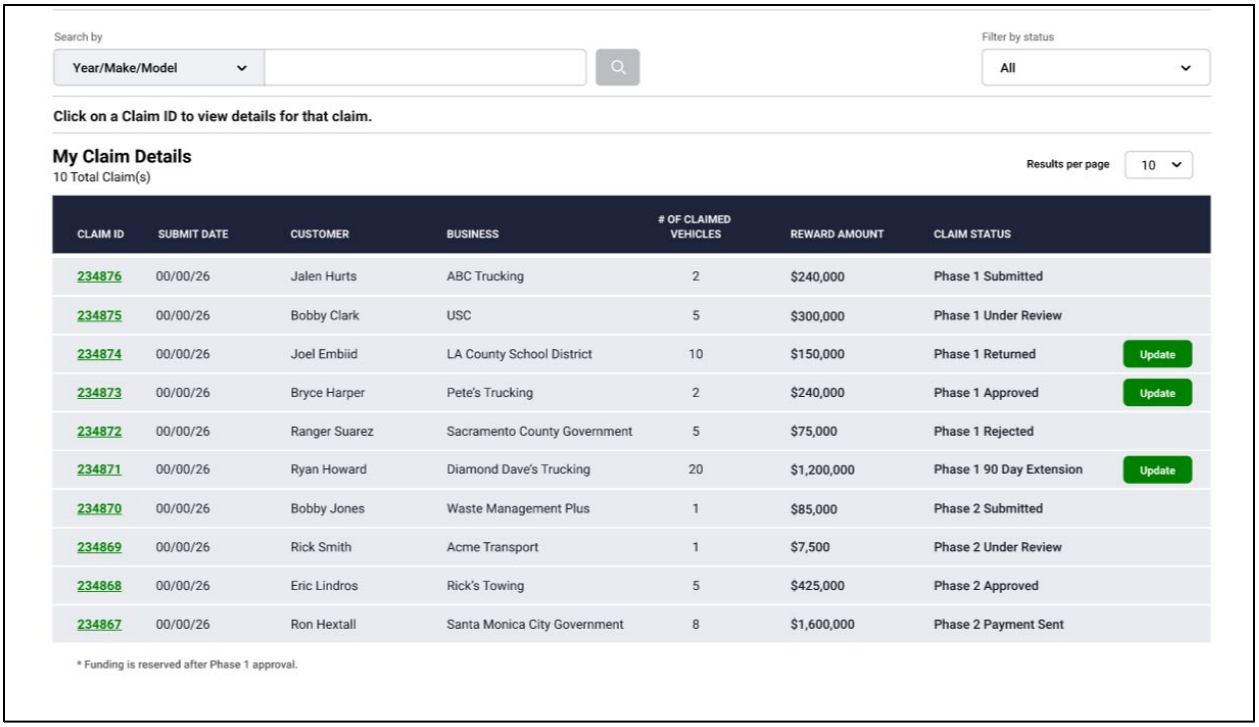
TRACKING AND MANAGING CLAIMS

Use the **My Claim Details** list on the Claims Management Dashboard to search, filter, and locate specific claims.



Search by: Year/Make/Model

Filter by status: All

Click on a Claim ID to view details for that claim.

My Claim Details
10 Total Claim(s)

Results per page: 10

CLAIM ID	SUBMIT DATE	CUSTOMER	BUSINESS	# OF CLAIMED VEHICLES	REWARD AMOUNT	CLAIM STATUS	
234876	00/00/26	Jalen Hurts	ABC Trucking	2	$240,000	Phase 1 Submitted	
234875	00/00/26	Bobby Clark	USC	5	$300,000	Phase 1 Under Review	
234874	00/00/26	Joel Embiid	LA County School District	10	$150,000	Phase 1 Returned	Update
234873	00/00/26	Bryce Harper	Pete's Trucking	2	$240,000	Phase 1 Approved	Update
234872	00/00/26	Ranger Suarez	Sacramento County Government	5	$75,000	Phase 1 Rejected	
234871	00/00/26	Ryan Howard	Diamond Dave's Trucking	20	$1,200,000	Phase 1 90 Day Extension	Update
234870	00/00/26	Bobby Jones	Waste Management Plus	1	$85,000	Phase 2 Submitted	
234869	00/00/26	Rick Smith	Acme Transport	1	$7,500	Phase 2 Under Review	
234868	00/00/26	Eric Lindros	Rick's Towing	5	$425,000	Phase 2 Approved	
234867	00/00/26	Ron Hextall	Santa Monica City Government	8	$1,600,000	Phase 2 Payment Sent	

* Funding is reserved after Phase 1 approval.

By default, claims are listed in descending order by **Claim ID**. You can **Search** for specific claims by vehicle year, make, or model; and **Filter** the list by **Claim Status.**

Note: *This Program is funded through California's Low Carbon Fuel Standard (LCFS). This Program is not funded by customer or ratepayer dollars.*

Questions? Contact Program Headquarters at **800-880-0320**
8:00 a.m.–5:00 p.m. PT, Mon–Fri (excluding holidays)
or email info@cleanfuelreward.com
cleanfuelreward.com

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Understanding Claim Status

The status of Phase 1 and Phase 2 Claims in the **My Claim Details** list will change over time to reflect where the claim is in the process. You will receive an automated email when a status change requires your attention; refer to the table for a listing of all claim statuses:

CLAIM STATUS	APPLIES TO PHASE	DEFINITION
Submitted	1 or 2	Claim has been submitted by a Participating Retailer. Program Implementer review is pending.
Under Review	1 or 2	Program Implementer is currently reviewing the claim for eligibility and accuracy.
Approved	1 or 2	Claim submission for the relevant Phase has been approved by the Program Implementer. If the status applies to a Phase 1 Claim, the Participating Retailer must provide VIN(s) (if necessary), complete the transaction, and deliver vehicle(s) within 180 calendar days.
Returned	1 or 2	Claim has been sent back to the Participating Retailer because the Program Implementer has identified an issue that must be corrected. The Participating Retailer must modify and resubmit the claim.
Rejected	1 or 2	Claim has been refused, usually because the Program Implementer has identified something that makes the claim ineligible for the Reward. Rejected claims cannot be updated or resubmitted.
Canceled	1 or 2	Claim has been closed (canceled) by the Participating Retailer.
Payment Sent	2	Reimbursement has been sent to the Participating Retailer's bank account.

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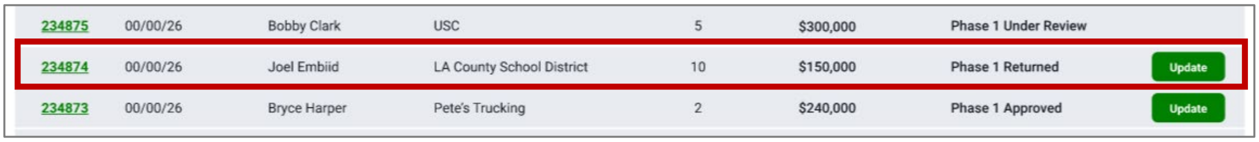
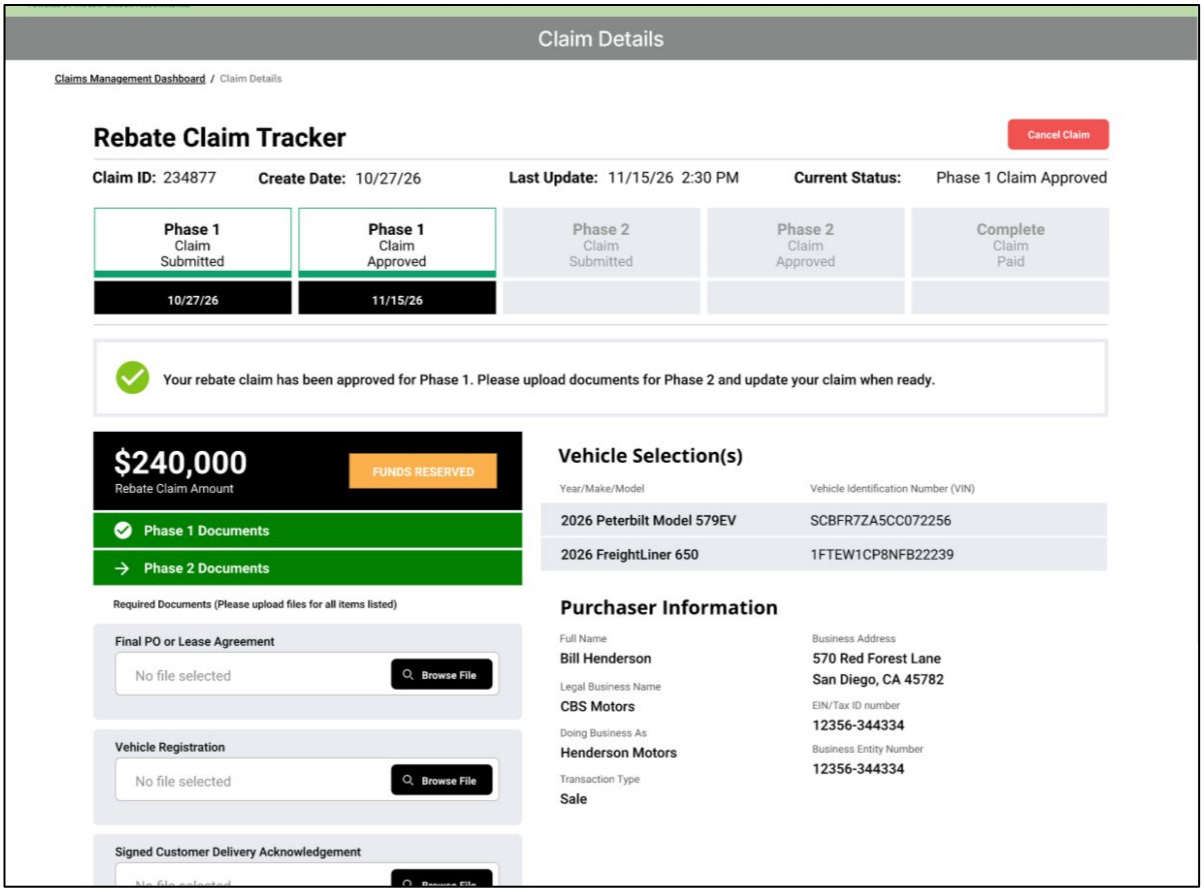
Working with Active Claims

Select any **Claim ID** from the list to view the **Claim Details** page. If a claim has been returned or needs additional information (such as VINs after Phase 1 approval), a green **Update** button will also appear on the claim's row, as a visual reminder that the claim requires attention.



Rebate Claim Tracker

The Claim Details page provides more information about a specific claim's status and progress. If you have appropriate permissions on the Retailer Portal, you can modify the claim on this page. See Retailer Portal Account Types for more information.



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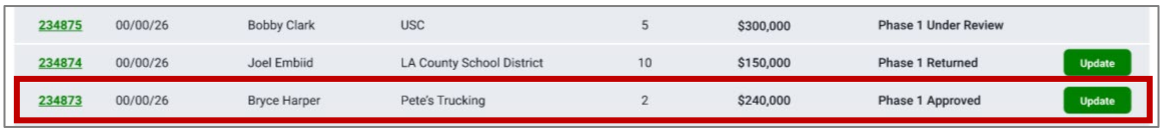
Adding VINs after Phase 1 Approval

Though Phase 1 Claims can be approved without VIN(s), it is not recommended since Phase 1 approval starts the 180 calendar day countdown. If the Participating Retailer fails to provide VIN(s) and deliver the vehicle(s) within 180 days, the claim will be rejected.

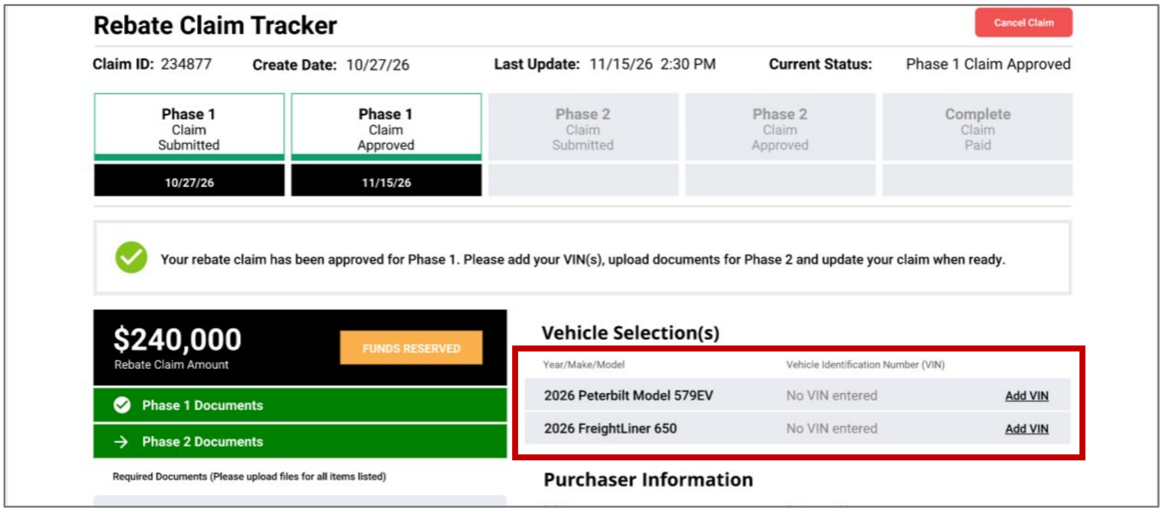
Participating Retailers who do submit Phase 1 Claims without VINs should make a point to provide the VINs as soon as they are available.

To add VINs to a Phase 1 Claim:

1. Locate the claim and click either the **Claim ID** or the green **Update** button.



2. Review the **Vehicle Selection(s)** list for vehicles without VINs. To add a VIN to a vehicle selection, click **Add VIN** next to its entry.



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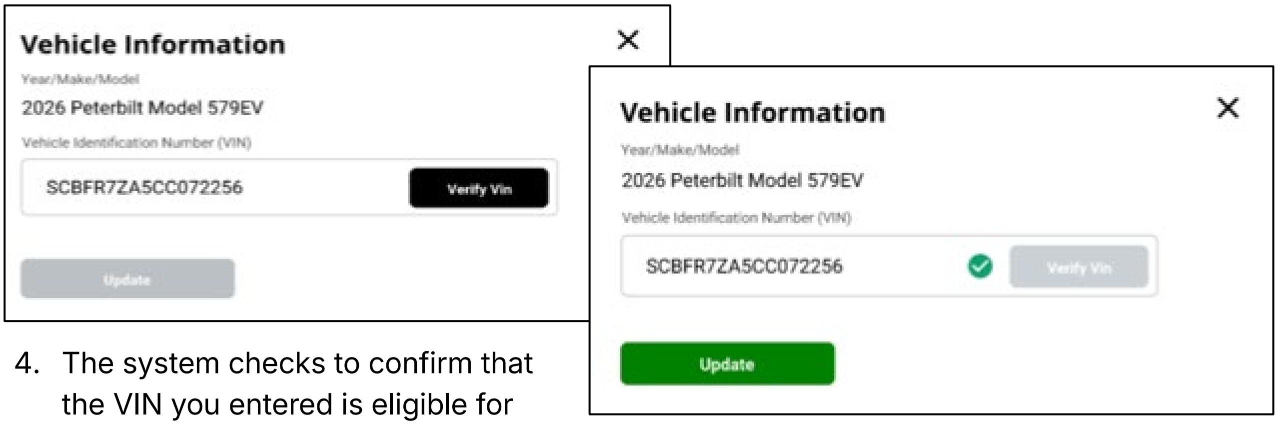
3. Enter the VIN in the pop-up that appears and select **Verify VIN.**



4. The system checks to confirm that the VIN you entered is eligible for the Reward. Once the check is complete, click the **Update** button.
5. Repeat as needed to add additional VINs.
    a. You can add a total of 20 VINs to a claim. If the transaction includes more than 20 VINs, create multiple claims.

Updating Returned Claims

Phase 1 or Phase 2 Claims can be returned to the Participating Retailer if the Program Implementer identifies issues that prevent approval but aren't serious enough to trigger an outright rejection. Claims can be returned multiple times if necessary.

When a claim is returned, the Participating Retailer receives an automated email with additional details on what needs to be corrected.

The process for updating a returned claim is essentially the same as the procedure for adding VIN(s):

1. Review the automated email.
2. Find the returned claim in the Claims Management Dashboard, and click either the green **Update** button or the **Claim ID.**

234875	00/00/26	Bobby Clark	USC	5	$300,000	Phase 1 Under Review	
234874	00/00/26	Joel Embiid	LA County School District	10	$150,000	Phase 1 Returned	Update
234873	00/00/26	Bryce Harper	Pete's Trucking	2	$240,000	Phase 1 Approved	Update

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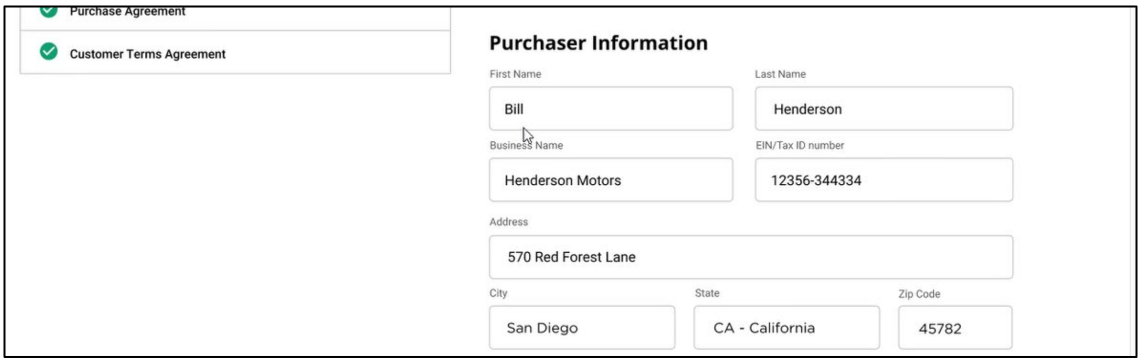
3. Click **Reasons/Comments** at the top of the Claim Details page to review what needs to be corrected.

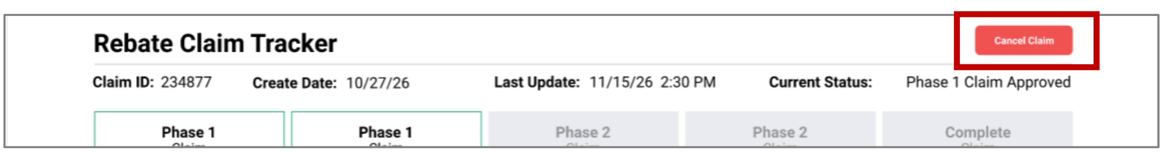
4. Locate and correct the issue(s) with the claim. This may require updating a required document and re-attaching it, making a change to one of the fields on the claim form, or both.



5. Once you are done with your modifications, click **Update Rebate Claim**.

Canceling Claims

If a Participating Retailer wishes to terminate an active claim for any reason, simply click the red **Cancel Claim** button on the Claim Details page:



The claim is immediately canceled. This action **cannot be undone,** so be cautious when canceling claims.

__Note:__ This Program is funded through California's Low Carbon Fuel Standard (LCFS). This Program is not funded by customer or ratepayer dollars.

Questions? Contact Program Headquarters at **800-880-0320**
8:00 a.m.–5:00 p.m. PT, Mon–Fri (excluding holidays)
or email info@cleanfuelreward.com
cleanfuelreward.com

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Troubleshooting Common Problems

Problems with claims in either phase are often due to mistakes or oversights. In most cases, these issues can be corrected by updating and resubmitting the claim, but it's better to avoid them altogether. Watch out for the following issues:

Missing or Mismatched Customer/Business Information

Customer and business information (legal business name, DBA, address, phone number, authorized representative name and contact information, signature) must match on all relevant claim forms and documents.

- Minor inconsistencies (Using "Steve" as a first name in one field and "Steven" in another) rarely cause problems, but it is a good practice to verify consistency across the board.
  - Use the Phase 1 Claim Checklist to collect and validate data early in the sales process, while the customer is still (literally or figuratively) in front of you. This document can be your single source of truth for both phases.

Customer Contact Changes After Phase 1

Because the Program requires that all instances of customer/business information—including contact name and signature—match on all paperwork, the **same person** who signs the preliminary Purchase Agreement has to sign the Customer Delivery Acknowledgment. By extension, the same person who bought or leased the vehicle(s) must be present to take delivery.

- This is not usually a problem provided the Participating Retailer informs the customer of this requirement up front. This is especially important if delivery is not scheduled for some time.
- If it isn't possible for the same individual to take delivery (if they left the company, for example), contact Program Headquarters for support.

Missing Signatures

In Phase 1, the Eligible Customer must sign and date the Customer Terms and Conditions Agreement and the preliminary Purchase Order/Lease Agreement.

In Phase 2, the customer also must sign the retailer's final Purchase/Lease Agreement and the Customer Delivery Acknowledgment. Digital or manual signatures are acceptable.

Note: additional signatures may be required on other paperwork. Be sure to check all documents to verify they are signed.

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Missing or Incorrect Dates

All signed paperwork should show the appropriate transaction date. If documents were signed on multiple days, ensure the date shown matches that on the preliminary Purchase Order or final Purchase/Lease Agreement.

Wrong File(s) Attached

The system has separate **Browse** buttons and attachment fields for each required document. Attaching the Customer Terms and Conditions Agreement, where it expects the preliminary P.O. (or any other file attachment mix-up) will result in a returned claim. Participating Retailers that handle many claims also need to ensure that the correct transaction and customer files are attached to each claim.

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ADVANCED RETAILER PORTAL TOPICS

This section covers additional Retailer Portal functionality and information relevant to users with admin-level access.

Retailer Portal Account Types

Each Participating Retailer is allowed two **Admins** and ten **General Users** on the Retailer Portal. The Primary Business Contact listed on the retailer's Enrollment Application is automatically assigned one of the two admin accounts when the Enrollment Application is approved.

Admins can then create additional accounts for other retailer personnel. See Managing User Accounts on the Retailer Portal for more information.

Retailer Portal Permissions by Account Type

Admins have significantly more access to Retailer Portal functionality than general users, including the ability to view and edit all claims created by the Participating Retailer. Similarly, some pages on the Retailer Portal are only visible to users with admin privileges.

PAGE	FUNCTION	ADMIN	GENERAL USER
Claims	Create/Submit Claims	●	●
	Edit/Update All Claims	●	
	View Own Claims	●	●
	View All Claims	●	
Marketing	View Assets	●	●
	Download Assets	●	●
Training Resources	View Assets	●	●
	Download Assets	●	●
Invoices	View Invoice List	●	
	View Invoice Details	●	
	Export Invoice Details	●	
Profile	Change Own Password	●	●
	Change Other Passwords	●	
	Create New Users	●	
	Delete Users	●	
	View User Accounts	●	
	Grant/Rescind Admin Privileges	●	
	View/Edit Own Profile	●	●
	View/Edit Retailer Contact Info	●	
	View/Edit Retailer Bank Info	●	
	View All Retailer Info	●	

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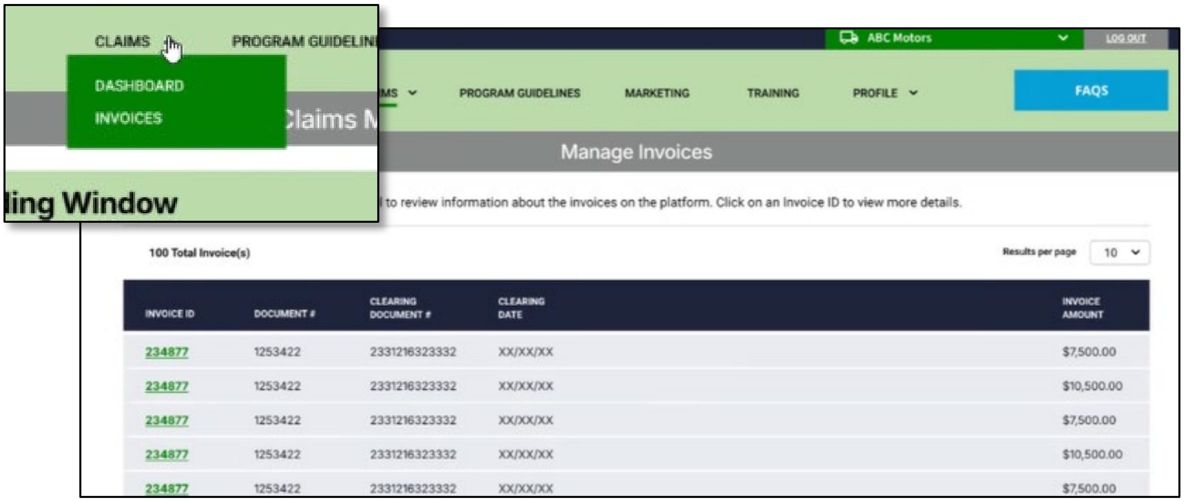
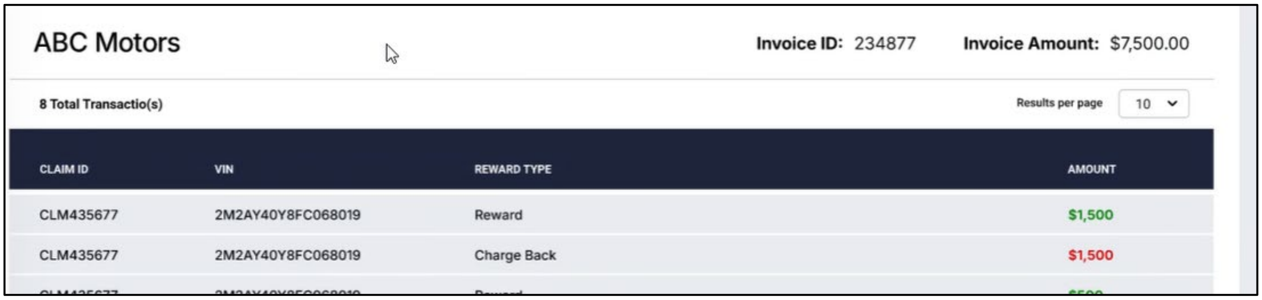
Invoices Page

General users who select the **Claims** menu item go straight to the Claims Management Dashboard. For admins, mousing over **Claims** summons a drop-down menu.

Select **Claims → Invoices** to visit the **Manage Invoices** page, where you can review information about invoices related to the platform.



Select an **Invoice ID** to view it.



The Program Implementer may bundle multiple Claim IDs and/or VINs into a single invoice if the claims were approved at or near the same time.

Click **Export All Claims** to download the invoice.

Note: This Program is funded through California's Low Carbon Fuel Standard (LCFS). This Program is not funded by customer or ratepayer dollars.

Questions? Contact Program Headquarters at **800-880-0320**
8:00 a.m.–5:00 p.m. PT, Mon–Fri (excluding holidays)
or email info@cleanfuelreward.com
cleanfuelreward.com

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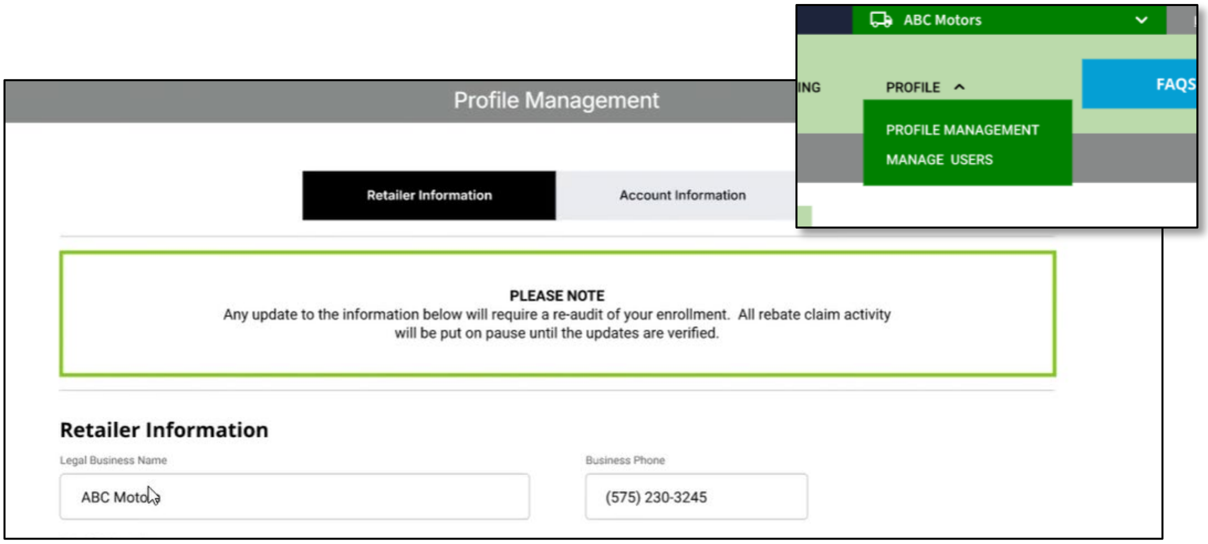
Editing Profile and Participating Retailer Information

Admins can edit their Participating Retailer's information by selecting **Profile → Profile Management,** then clicking the **Retailer Information** button:



The business address, contact details, and banking information can all be updated.

Editing retailer information is not recommended without a good reason.

Changes to banking information are reviewed and validated by Program Headquarters. The length of time that validation takes varies based on several factors, and no reimbursements will be issued to the Participating Retailer until the new banking information is approved.

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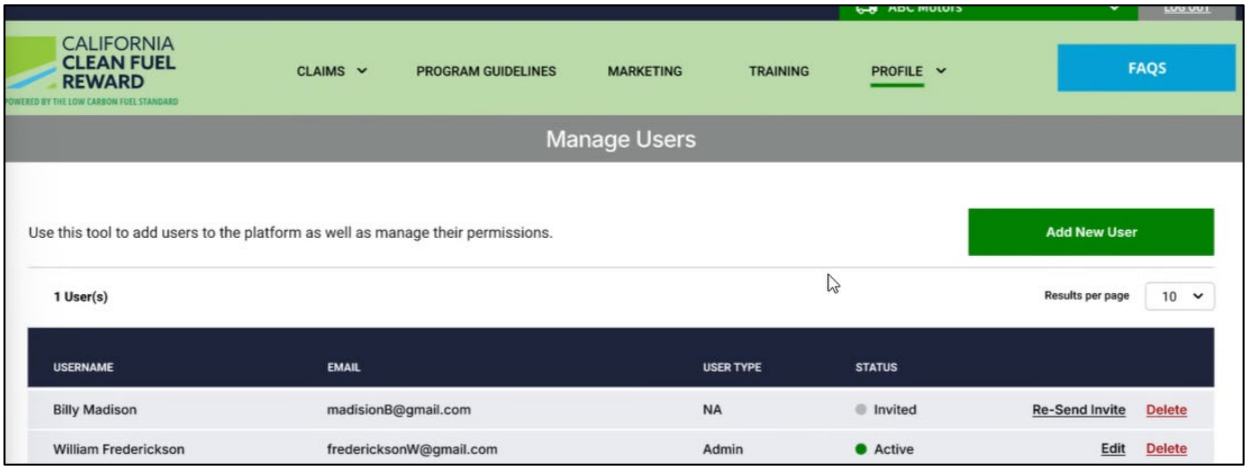
Managing User Accounts on the Retailer Portal

Select **Profile → Manage Users** to view, edit, and add new accounts to the Retailer Portal:

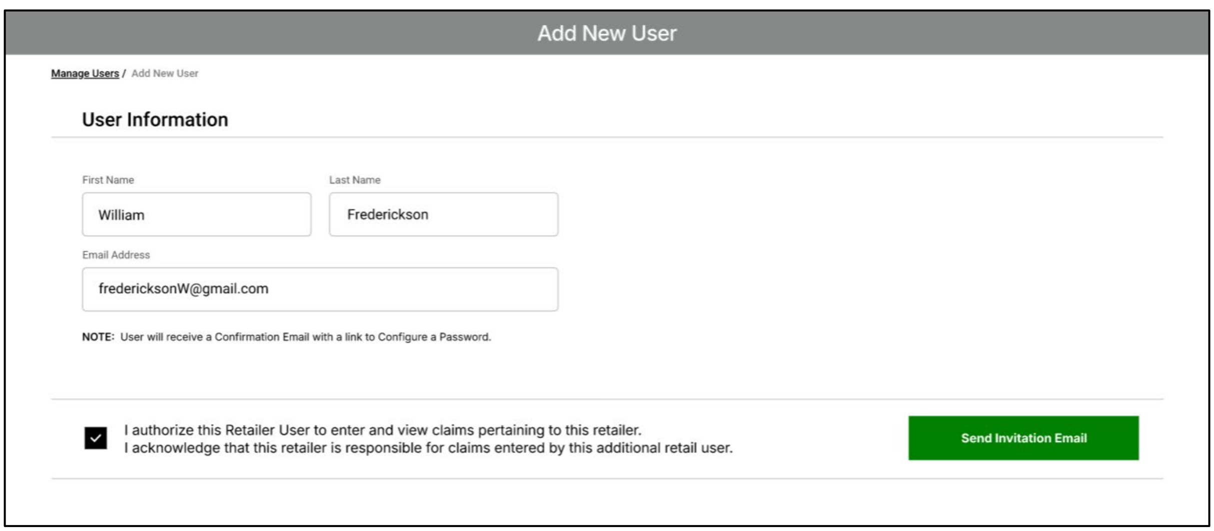


When you first log into the Retailer Portal, only one account will be present: the Primary Business Contact indicated on the Enrollment Application. This account is automatically granted one of the two admin slots available to each Participating Retailer.

Creating New Users

Creating additional user accounts is simple.

1. On the **Manage Users** page, click the **Add New User** button.
2. Fill in all required information:



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3. Place a check in the Authorization and Acknowledgment field, then click **Send Invitation Email** to send an email to the new user you created.
4. Back on the Manage Users page, a new entry appears on the list, showing **Invited** as their status:

    a. An **Invited** user has no access to the Retailer Portal until the recipient completes the account setup steps included in the invitation email.

5. If necessary, click **Re-Send Invite** to send another account activation email. The recipient must click the email link and create an account to complete the process.

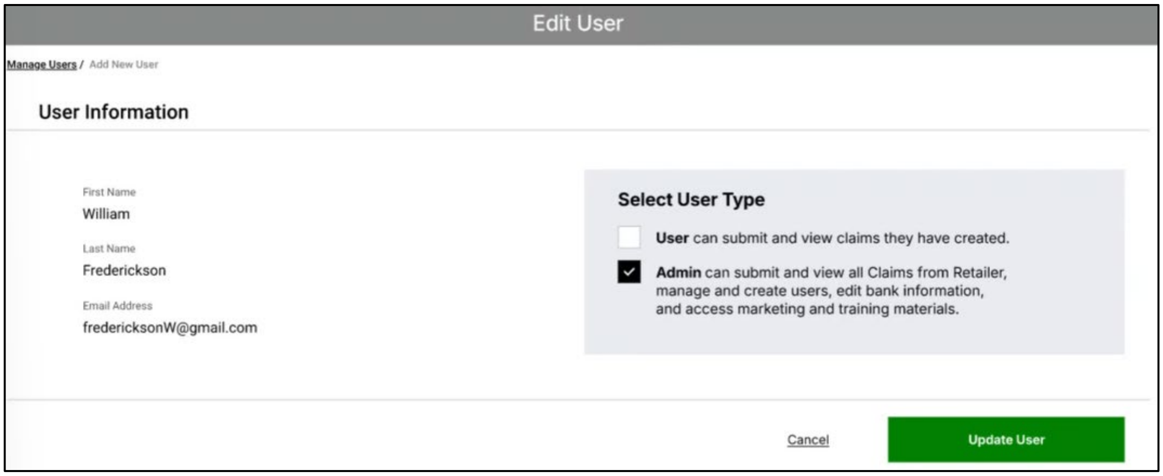
Editing User Privileges

Each Participating Retailer receives ten **general user** roles. Newly created accounts default to being general users.

Only the two admins at a Participating Retailer can upgrade (or downgrade) user account levels. To do so, follow these steps:

1. Find the desired user account and select **Edit.**

2. Select the desired user level in the **Select User Type** box, then click **Update User.**



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Deleting Accounts

Admins can delete active and invited users by clicking **Delete** next to the desired entry. You will receive a pop-up confirmation before the account is deleted.

Billy Madison	madisionB@gmail.com	NA	Invited	Re-Send Invite Delete
William Frederickson	fredericksonW@gmail.com	Admin	Active	Edit Delete

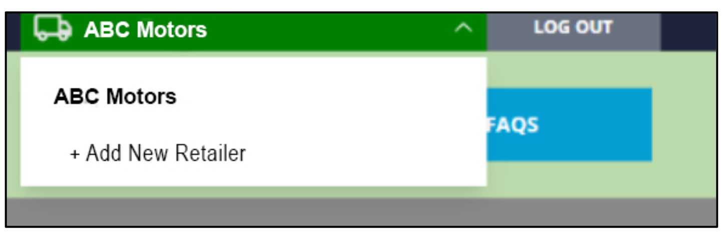
Adding Additional Retailers to a Group

Retailer groups and Participating Retailers with multiple locations may be managed collectively in the Retail Portal if they wish.

First, visit the Program Website and submit an Enrollment Application for *one* location or group member that will serve as the "primary" Participating Retailer. (See Retailer Enrollment for more information.) Once the "primary" retailer is enrolled in the Program, log in to the Retailer Portal as an admin (the Primary Business Contact on the initial Enrollment Application), and follow these steps:

1. Once logged in as an admin, check the upper-right of the screen for a green bar with the primary Participating Retailer's business name:

2. Click Participating Retailer's name to open the pull-down menu. Select **+ Add New Retailer:**



3. Complete and submit another Enrollment Application for the location or group member you wish to add:
4. Repeat this process for every location or group member.

Once the additional Enrollment Applications are approved, the new group members will appear in the same pull-down menu, beneath the primary Participating Retailer. Users with admin access can cycle through group members by selecting the desired Retailer name from the list.

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If you have any questions regarding these guidelines, please contact Program Headquarters at info@cleanfuelreward.com.