

# **GUIDELINE FOR THE MASSACHUSETTS OFFERS REBATES FOR ELECTRIC VEHICLES (MOR-EV) PROGRAM**

**For Applicants**

Revised July 30, 2024



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## GUIDELINE FOR THE MASSACHUSETTS OFFERS REBATES FOR ELECTRIC VEHICLES PROGRAM

### For Applicants

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## Program Overview

The Massachusetts Offers Rebates for Electric Vehicles (MOR-EV) initiative is dedicated to making electric vehicles (EVs) more affordable for residents, businesses, non-profit organizations, and other entities in the Commonwealth to help achieve clean transportation goals and reduce greenhouse gas emissions and provide more equitable access to EVs.

Established by the Executive Office of Energy and Environmental Affairs’ Department of Energy Resources (DOER) and administered statewide by the Center for Sustainable Energy (CSE, or Program Administrator), MOR-EV provides rebates to Massachusetts residents, businesses, non-profit organizations and other eligible entities for the purchase or lease of battery electric vehicles and fuel-cell electric vehicles contingent upon availability of funds.

The following MOR-EV rebates are currently offered for eligible electric vehicles:

<b>MOR-EV Rebates and Rebate Adders</b>	<b>Rebate Available at Point of Sale or Lease at Participating Dealerships</b>	<b>Rebate Available Post-Purchase or Lease</b>
<a href="#">MOR-EV Standard</a> (New Light-Duty Vehicles)	✓	✓
<a href="#">MOR-EV Used</a> (Used Light-Duty Vehicles)	✓*	✓
<a href="#">MOR-EV+</a> Income-qualifying Rebate Adder	✓*	✓
<a href="#">MOR-EV Trade-In</a> (Internal Combustion Engine Vehicle Trade-In)		✓
<a href="#">MOR-EV Trucks</a> (New Pickup Trucks and Other Class 2b Vehicles)		✓
<a href="#">MOR-EV Medium- and Heavy-Duty Rebates</a> (New Class 3-8 Vehicles)		✓
Environmental Justice Adder for MOR-EV Medium and Heavy-Duty Vehicle Program		✓

\*With an approved prequalification voucher

*For complete program requirements, Applicants should refer to the [MOR-EV website](#) and [MOR-EV Regulations](#) (225 CMR 26.00), which may be amended from time to time. Terms that are capitalized have the same definition as in the MOR-EV Regulations.*

## **1. MOR-EV Standard (New Light-Duty Vehicle Rebates)**

As of August 9, 2023, the MOR-EV Standard rebate of \$3,500 for purchases or leases of eligible new light-duty battery electric vehicles (BEVs) and fuel-cell electric vehicles (FCEVs) is offered through Participating Dealerships in the Commonwealth at the point of sale or at the time of lease. Alternatively, Applicants can still apply for a rebate online within 90 days of the purchase or lease of an eligible vehicle.

### **1.1 Applicant Eligibility**

Applicants must be either a private individual who is a resident of Massachusetts, or a business or non-profit organization located and licensed to operate in Massachusetts. Proof of Massachusetts residency or licensure will be required to complete a MOR-EV application. Governments and other entities are not eligible to apply.

Active-duty military members stationed in Massachusetts with a temporary Massachusetts residential address, but with permanent residency in another state, are eligible to apply and may use military orders in lieu of other proof of residency documentation.

### **1.2 Vehicle Eligibility and Rebate Amounts**

Vehicles must meet the following criteria to be eligible for a MOR-EV Standard rebate:

- The vehicle must be a new<sup>1</sup> battery electric vehicle (BEV) or a fuel cell electric vehicle (FCEV). A list of eligible vehicle models<sup>2</sup> is maintained on the MOR-EV website at <https://mor-ev.org/eligible-vehicles>.

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<sup>1</sup> A New Vehicle is defined as a motor vehicle constructed of new parts that has never been the subject of a retail sale and has never been registered with the Massachusetts Registry of Motor Vehicles or with the appropriate agency or authority in any other jurisdiction. Vehicles utilized as dealership floor models and/or test drive vehicles (i.e., dealer demonstration vehicles) are eligible for a rebate only if they have never been previously registered. Vehicles determined by the Program Administrator to be unrebated rollback or unwind vehicles are considered new vehicles.

<sup>2</sup> The MOR-EV List of Eligible Vehicle Models will be periodically updated as vehicle models are approved. The original equipment manufacturer (OEM) must reach out to the MOR-EV Program Administrator for eligibility consideration and provide Vehicle Identification Number (VIN) decipherment and a marketing photo of the vehicle. If the vehicle meets the eligibility requirements set forth above, then the Program Administrator will add the vehicle to the List of Eligible Vehicle Models. Vehicle makes and models will be listed along with vehicle photographs on the website by the Program Administrator within one business day after the vehicle is approved. New model years of vehicles already approved for MOR-EV eligibility can be rebated prior to the new model year being added to the List of Eligible Vehicle Models as long as the vehicle still meets all current program eligibility guidelines. All other new vehicle models purchased before being on the List of Eligible Vehicle Models are not rebate eligible.

- The vehicle must have a Sales Price<sup>3</sup> (total MSRP) of \$55,000 or below at the time of purchase or lease.
- With the exception of the Test Drive/Rollback/Unwind Vehicle Provision detailed below, the vehicle must be a new vehicle, constructed of new parts that has never: been the subject of a retail sale, registered with the Massachusetts Registry of Motor Vehicles (RMV), or registered with the appropriate agency or authority in any other jurisdiction (e.g., vehicles may be dealership floor models and test drive vehicles if meeting this condition).

### **1.2.1 Floor Model/Test Drive/Rollback/Unwind Vehicle Provision**

The Program Administrator will use specific procedures when processing rebate applications for floor model, test drive, unwind and rollback vehicles. Rebates for such vehicles are only available after purchase or lease unless the Program Administrator has provided advanced written approval to the dealership and/or Applicant for the specific vehicle in question; in these instances, a rebate may be available at the time of sale or lease.

1. Floor Model or Test Drive vehicles: Vehicles previously used as dealership floor models and test drive vehicles are eligible for the MOR-EV Standard rebate if the vehicles have not been previously registered with the Massachusetts RMV or its equivalent in any other state.
  2. Rollback or Unwind vehicles: A “rollback” occurs when a buyer purchases or leases a vehicle then returns it shortly after purchase, or when a buyer’s financing is disapproved. An “unwind” occurs when registration is completed, but the sale was not consummated, and the buyer never took delivery. Vehicles determined by the Program Administrator to be unrebated Rollback or Unwind Vehicles will be eligible to receive a rebate. Additional documentation from the dealership may be required; please contact the Program Administrator if there are any questions.
- The MOR-EV Standard rebate is available only for the purchase or lease of eligible vehicles from licensed dealerships or from an original equipment manufacturer (OEM). Vehicles purchased or leased outside the Commonwealth of Massachusetts are eligible to receive a post-purchase rebate as long as the vehicle is registered with the Massachusetts RMV and the Applicant applies for the rebate within 90 days of the date of purchase or lease.
  - The vehicle model must be certified by the California Air Resources Board (CARB) as specified in the On-Road New Vehicle and Engine Certification Program with a fuel type or fuel category of lithium-ion battery (Li+) or fuel cell consuming on-board stored hydrogen (FCH2).

The following vehicles are not currently eligible:

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<sup>3</sup> The Sales Price at the time of sale or lease includes all costs associated with a vehicle as recommended by the manufacturer (i.e. the total manufacturer suggested retail price (MSRP). It encompasses the base price of the vehicle, additional features, and packages (including but not limited battery upgrades, autonomous upgrades, wheel and tire packages, paint options, audio and infotainment system) and destination charges as suggested by the manufacturer and listed on the vehicle's Monroney label or window sticker. The Sales Price does not include any OEM or dealership discounts, applicable taxes, registration fees, vehicle pre-order or ordering fees, documentation fees or additional maintenance or repair packages purchased from the dealership.

- Aftermarket plug-in hybrid electric and battery electric vehicle conversions.
- Electric scooters, all-terrain vehicles, or low-speed electric vehicles.
- Neighborhood electric vehicles.
- Zero emission motorcycles.

### **1.3 Other Eligibility Requirements and Program Conditions**

Applicants must acknowledge and adhere to the following requirements to receive a MOR-EV Standard rebate:

- Applicants must retain ownership of the vehicle for a minimum of 36 consecutive months from the vehicle purchase or lease date. Resale of a MOR-EV vehicle for financial gain within 36 months is prohibited.
  - a. For purchases, the new vehicle must maintain registration with the Massachusetts RMV for a minimum of 36 consecutive months for use in Massachusetts.
  - b. For leases, the lease term must be at least 36 months for program eligibility. Register the New vehicle with the Massachusetts RMV for a minimum of 36 consecutive months for use in the Commonwealth.
- Applicants must not make or allow any modifications to the vehicle’s emissions control systems, hardware, or software calibrations.
- Applicants must agree that that any emission reductions generated by the purchased vehicle will not be used as marketable emission reduction credits, to offset any emission reduction obligation of any person, or to generate a compliance extension or extra credit for determining regulatory compliance.
- DOER reserves the right to request voluntary participation from rebate recipients in ongoing research efforts that support MOR-EV and DOER goals.

### **1.4 Application Process**

There are two processes through which an eligible Applicant can claim a MOR-EV Standard rebate: at the point of sale or lease, or by applying online with supporting documentation within 90 days of the purchase or lease date.

#### **1.4.1 Rebate at Point of Sale or Lease**

As of August 9, 2023, the MOR-EV Standard Rebate of \$3,500 for purchases or leases of eligible new light-duty vehicles is offered through Participating Dealerships in the Commonwealth at the time of purchase or lease. A list of Participating Dealerships will be maintained on the MOR-EV website at <https://mor-ev.org/participating-dealers>.

Eligible Applicants must bring the following documents to a participating dealership to claim the MOR-EV Standard rebate when they purchase or lease an eligible vehicle:

- Individuals: a copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
  - i. Individuals who do not have a Massachusetts driver's license are required to provide 1) a legible copy of an alternate unique identifier, such as an out of state driver's license or state identification card, and 2) one of these alternate forms of proof of residency:
    - A utility or cable bill addressed to the applicant dated within the last three months showing a Massachusetts service address.
    - A copy of the current Massachusetts RMV registration of another vehicle in the name of the purchaser or lessee that is valid at the time of the application. A registration for a planned non-operational vehicle does not meet this requirement.
    - A signed, dated, and notarized Massachusetts residential rental agreement.
    - Military orders for active-duty military members stationed in Massachusetts but with permanent residency in another state.
    - If the applicant is unable to provide one of the approved options listed above, the Program Administrator may approve alternative forms of residency on a case-by-case basis. The Applicant must provide the Participating Dealership with a copy of the alternative residency approval email from the Program Administrator along with the approved alternative proof of residency; the Participating Dealership must include copies of both along with other supporting documentation when requesting rebate reimbursement.
- Businesses or non-profit organizations: a copy of a local business license, articles of incorporation, articles of organization, statement of information, or other formation document filed with the Massachusetts Secretary of State.

The Participating Dealership must apply the MOR-EV Standard rebate at time of purchase or lease and the following documents are required for the dealer to complete the rebate application on behalf of the Applicant:

- A copy of the Applicant Terms & Conditions signed by the Applicant or Applicant's representative (e.g., for a corporate fleet acquisition) at the dealership.
- A copy of the Rebate Transfer Acknowledgement Form signed by 1) the Applicant or Applicant's representative, and 2) the dealership representative at the dealership.
- A copy of the final sales or lease contract with an itemization of credits, discounts, and incentives received, if applicable. Both the Applicant and the dealership must be listed on the document. All pages must be present and legible.
- A copy of the Massachusetts registration certificate for the vehicle.



#### 1.4.2 Rebate Post Purchase or Lease

If the MOR-EV Standard rebate was not applied at the point of sale, eligible Applicants can apply for the MOR-EV Standard rebate online within 90 calendar days of the date of purchase or lease. Eligible vehicles purchased or leased prior to August 9, 2023, and vehicles acquired outside of the Commonwealth or from a non-participating dealership must complete the application post purchase.

The purchaser or lessee must apply via the online application portal<sup>4</sup> at <https://apply.mor-ev.org> to select their eligible vehicle, check the required box that the Applicant has, *“Read and understands the Massachusetts Offers Rebates for Electric Vehicles Program’s Terms and Conditions,”* and complete the online application form.

The application must be completed and supporting documents must be uploaded through the secure application portal within 90 calendar days of the vehicle date of purchase or lease. Once an application is started in the application portal, it must be completed and submitted within 15 days. For rebate purposes, the date of purchase is the day that the purchase and sales agreement has been signed and the vehicle enters into the consumer’s possession. For rebate purposes, a vehicle is deemed leased on the date upon which the lease of the eligible vehicle commences as specified in a signed lease agreement.

If the Applicant does not have access to a computer, the Applicant can call the toll-free MOR-EV number (1-866-900-4223) and the application form will be sent including the request for supporting documentation. The completed, signed application must be sent along with the required documentation within 90 calendar days of the vehicle purchase or lease date. This paper application must contain all information regarding consumer directions that are found on the website.

Required documentation will include, at a minimum, the following:

- A copy of the Massachusetts registration certificate for the vehicle.
- A copy of the final sales or lease contract with an itemization of credits, discounts, and incentives received, if applicable.
- Proof of residency: If applying as an individual, a copy of a Massachusetts driver license or other valid form of Massachusetts residency as approved by the Program Administrator. If applying as an organization such as a business, nonprofit: a copy of a local business license, articles of incorporation, articles of organization, statement of information, or other formation document filed with the Massachusetts Secretary of State.
- For Applicants who request applications by phone or mail, a complete application with signature and date.

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<sup>4</sup> If an Applicant does not have internet access, mail can be accepted. Please reference the [MOR-EV mailing procedures](#).

If the Program Administrator determines that an application or its required documents are incomplete, illegible, or missing required information, the Program Administrator will notify the Applicant of the error via email (or by phone, if the Applicant has applied via mail). The Applicant then shall have an additional 10 calendar days from the date of notification to correct any errors or omissions. If the Applicant fails to correct the errors or omissions within the additional 10 calendar days, the Program Administrator will cancel the application and will not release the reserved funds to an Applicant.

If the Program Administrator determines an Applicant is ineligible for a rebate, the Program Administrator will cancel the application and notify the Applicant via email (or by phone, if the Applicant has applied via mail). Applicants are responsible for ensuring that they receive and review these email communications. If the Program Administrator cancels a rebate application for a particular vehicle, Applicants may reapply for a rebate for that vehicle within 90 calendar days of the date of purchase or lease.

For applications that the Program Administrator has determined are complete, the Program Administrator will send a rebate check within 90 calendar days of approval. Rebates will be paid in the order that complete rebate request application and supporting documentation is submitted to the Program Administrator prior to exhaustion of available rebate funds. Rebate checks must be cashed within 90 days of the check date. Checks not cashed within this timeframe will be cancelled, and the rebate amount will be returned to the MOR-EV fund.

## **2. MOR-EV Used (Used Light-Duty Vehicle Rebates)**

A rebate of \$3,500 for the purchase or lease of eligible used light-duty vehicles is available for income-qualifying Massachusetts residents. The MOR-EV Trucks program is not eligible for the MOR-EV Used rebate.

### **2.1 Applicant Eligibility**

Massachusetts residents who meet the following requirements qualify for a MOR-EV Used rebate:

- Participate in one of the following state or federal income-qualifying programs:
  - Residential Assistance for Families in Transition (RAFT)
  - Prescription Drug Assistance
  - Child Care Financial Assistance (CCFA)
  - Mass Save Income Eligible Programs
  - Supplemental Nutrition Assistance Program (SNAP)
  - Massachusetts Rental Voucher Program (MRVP)
  - Low-Income Home Energy Assistance PROGRAM (LIHEAP)
  - Massachusetts Health Connector

- Supplemental Security Income (SSI)
- State Supplement Program
- Mass Health
- Massachusetts Health Safety Net
- Massachusetts Transitional Aid to Families with Dependent Children (TAFDC)
- Low-Income Weatherization Assistance Program (LIWAP)
- Emergency Aid to the Elderly, Disabled, and Children (EAEDC)
- Section A8 Housing Choice Voucher Program (HCVP)
- Women, Infants, and Children Program Nutrition Program (WIC)
- Veterans Programs (Chapter 115 Benefits)
- Veterans Dependency and Indemnity Compensation (DIC) Surviving Parent
- Veterans Affairs Non-Service-Connected Pension (VANSCP)

**Or**

- Have a maximum modified adjusted gross income (MAGI) as follows:
  - \$150,000 for married filing jointly or a surviving spouse
  - \$112,500 for heads of households
  - \$75,000 for all other filers

**and**

- Not be able to be claimed as a dependent on another person's tax return

**2.2 Vehicle Eligibility**

Used Vehicles must meet the following criteria to be eligible for a rebate:

- The vehicle must be battery electric vehicle (BEV) or a fuel cell electric vehicle (FCEV). A list of eligible vehicle models<sup>5</sup> is maintained on the MOR-EV website at <https://mor-ev.org/eligible-vehicles>.
- Vehicles must be listed as “Used” on the final purchase or lease agreement.
- Have a Purchase Price<sup>6</sup> of \$40,000 or less.
- Must have been certified by the California Air Resources Board (CARB) as specified in the On-Road New Vehicle and Engine Certification Program with a fuel type or fuel category of lithium-ion battery (Li+) or fuel cell consuming on-board stored hydrogen (FCH2) at the time of manufacture.

### 2.3 Other Eligibility Requirements and Program Conditions

Applicants must acknowledge and adhere to the following requirements to receive a MOR-EV Used rebate:

- Applicants must confirm that to the best of their knowledge the used vehicle applying for the MOR-EV rebate was not purchased new or used within the previous 24 months (or leased for a period of less than 36 months) and did not receive a MOR-EV rebate within the previous 36 months.
- The program allows for a lease buyback (e.g., an individual purchasing the same vehicle they have been leasing at the end of that individual’s lease) if the original minimum 36-month lease criterion has been met and both the vehicle and applicant meet the eligibility requirements for MOR-EV Used.
- Applicants must retain ownership of the used vehicle for a minimum of 36 consecutive months from the vehicle purchase or lease date. Resale of a MOR-EV vehicle for financial gain within 36 months is prohibited.
  - a. For purchases, the used vehicle must maintain registration with the Massachusetts RMV for a minimum of 36 consecutive months for use in Massachusetts.
  - b. For leases, the lease term must be at least 36 months for program eligibility.
- Vehicle must be available for retail purchase or lease at a licensed dealership. Private sales are not eligible for the program.

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<sup>5</sup> The MOR-EV List of Eligible Vehicle Models will be periodically updated as vehicle models are approved. If the vehicle meets the eligibility requirements set forth above, then the Program Administrator will add the vehicle to the List of Eligible Vehicle Models. Vehicle makes and models will be listed along with vehicle photographs on the website by the Program Administrator within one business day after the vehicle is approved. If a vehicle meets the eligibility requirements but is not listed as an eligible vehicle, please contact the Program Administrator at [mor-ev@energycenter.org](mailto:mor-ev@energycenter.org).

<sup>6</sup> The final purchase price, or gross capitalized cost for a lease, of the Used Vehicle minus registration fees, documentation fees, or sales and use taxes.

- Register the used vehicle with the Massachusetts RMV for a minimum of 36 consecutive months for use in the Commonwealth.
- Applicants must not make or allow any modifications to the vehicle's emissions control systems, hardware, or software calibrations.
- Applicants must agree that any emission reductions generated by the purchased vehicle will not be used as marketable emission reduction credits, to offset any emission reduction obligation of any person, or to generate a compliance extension or extra credit for determining regulatory compliance.
- DOER reserves the right to request voluntary participation from rebate recipients in ongoing research efforts that support MOR-EV and DOER goals.

## 2.4 Application Process

There are two processes through which an eligible Applicant can claim a MOR-EV Used rebate: at the point of sale or lease upon receiving an approved prequalification voucher, or by applying online with supporting documentation within 90 days of the purchase or lease date.

### 2.4.1 Prequalification and Rebate at Point of Sale or Lease

To receive the MOR-EV Used rebate at the point of sale, eligible Applicants must prequalify prior to purchasing or leasing the vehicle. Eligible Applicants can apply online via the application portal at <https://apply.mor-ev.org/> for a prequalification voucher and then bring the approved voucher to a participating dealership to receive a MOR-EV Used rebate at the point of sale.

Prequalification vouchers must be redeemed within 6 months of the date of voucher approval. Vouchers not redeemed within 6 months of approval will expire and Applicants will need to re-apply if the vehicle has not yet been purchased or leased. Prequalification vouchers are non-transferable between individuals including (but not limited to) spouses, family, and household members. The Applicant listed on the prequalification voucher approval is the only person eligible for the rebate. If the vehicle is purchased or leased prior to the prequalification voucher's approval, the Applicant is not eligible to claim the rebate at the point of sale and must apply for the MOR-EV Used rebate post-purchase.

If the Applicant does not have access to a computer, the Applicant can call the toll-free MOR-EV number (1-866-900-4223) and the forms will be sent via mail, including the request for supporting documentation. The completed, signed application must be sent along with the required documentation. This paper application must contain all information regarding consumer directions that are found on the website.

Required documentation will include, at a minimum, the following:

- **Proof of Residency:** A copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
- A document confirming income-eligibility. One of the following must be provided:

- A tax transcript<sup>7</sup> for the Applicant, confirming the Applicant is not able to be claimed as a Dependent on another person's tax return **and** confirming a modified adjusted gross income (MAGI) below the applicable threshold:
  - \$150,000 for married filing jointly or a surviving spouse
  - \$112,500 for heads of households
  - \$75,000 for all other filers
- A document confirming participation in one of the income-qualifying programs.<sup>8</sup>

If the Program Administrator determines that an application or its required documents are incomplete, illegible, or missing required information, the Program Administrator will notify the Applicant of the error via email (or by phone, if the Applicant has applied via mail). The Applicant then shall have an additional 10 calendar days from the date of notification to correct any errors or omissions. If the Applicant fails to correct the errors or omissions within the additional 10 calendar days, the Program Administrator will cancel the application and will not issue a prequalification voucher.

If the Program Administrator determines the Applicant is ineligible for a prequalification voucher, the Program Administrator will cancel the application and notify the Applicant via email (or by phone, if the Applicant has applied via mail). Applicants are responsible for ensuring that they receive and review these email communications. If the Program Administrator cancels a prequalification voucher application, Applicants may reapply for a voucher as long as rebate funds are available.

For applications that the Program Administrator has determined are complete, the Program Administrator will send an approval email and voucher identification (ID) number via email (or by mail if the applicant has specifically requested mail delivery).

Applicants with prequalification approval must bring the following documents to a participating dealership to claim the MOR-EV Used rebate when they purchase or lease an eligible vehicle:

- Copy of the approved MOR-EV Used prequalification voucher.
- Individuals: a copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
  - i. Individuals who do not have a Massachusetts driver's license are required to provide 1) a legible copy of an alternate unique identifier, such as an out of state driver's license or state identification card, and 2) one of these alternate forms of proof of residency:
    - A utility or cable bill addressed to the applicant dated within the last three months showing a Massachusetts service address.

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<sup>7</sup> <https://www.irs.gov/individuals/transcript-types-and-ways-to-order-them>

<sup>8</sup> See Appendix A, Document Guide for Income-Qualifying Programs.

- A copy of the current Massachusetts RMV registration of another vehicle in the name of the purchaser or lessee that is valid at the time of the application. A registration for a planned non-operational vehicle does not meet this requirement.
- A signed, dated, and notarized Massachusetts residential rental agreement.
- Military orders for active-duty military members stationed in Massachusetts but with permanent residency in another state.

If the applicant is unable to provide one of the approved options listed above, the Program Administrator may approve alternative forms of residency on a case-by-case basis. The Applicant must provide the Participating Dealership with a copy of the alternative residency approval email from the Program Administrator along with the approved alternative proof of residency; the Participating Dealership must include copies of both along with other supporting documentation when requesting rebate reimbursement.

The Participating Dealership must apply the MOR-EV Used rebate at time of purchase or lease and the following documents are required for the dealer to complete the rebate application:

- A copy of the Applicant Terms & Conditions signed by the Applicant or Applicant’s representative (e.g., for a corporate fleet acquisition) at the dealership.
- A copy of the Rebate Transfer Acknowledgement Form signed by 1) the Applicant or Applicant’s representative, and 2) the dealership representative at the dealership.
- A copy of the Used Vehicle Attestation signed by the Applicant at the dealership.
- A copy of the final sales or lease contract with an itemization of credits, discounts, and incentives received, if applicable. Both the Applicant (consumer) and the dealership must be listed on the document. All pages must be present and legible.
- A copy of the Massachusetts registration certificate for the vehicle.

#### 2.4.2 Rebate Post Purchase or Lease

Eligible Applicants can apply for the MOR-EV Used rebate online within 90 calendar days of the date of purchase or lease. Eligible Applicants who purchased a qualifying used light-duty ZEV on or after November 10, 2022, have until November 6, 2023, to apply for the MOR-EV Used rebate.

The purchaser or lessee must apply via the online application portal<sup>9</sup> at <https://apply.mor-ev.org/> to select their eligible vehicle, check the required box that the Applicant has “*Read and understands the Massachusetts Offers Rebates for Electric Vehicles Program’s Terms and Conditions*” and complete the online application form. The application must be completed and supporting documents must be uploaded through the secure application portal within 90 calendar days of the vehicle date

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<sup>9</sup> If an Applicant does not have internet access, mail can be accepted. Please reference the [MOR-EV mailing procedures](#).

of purchase or lease. Once an application is started in the application portal, it must be completed and submitted within 15 days.

For rebate purposes, the date of purchase is the day that the purchase and sales agreement has been signed and the vehicle enters the consumer's possession. For rebate purposes, a vehicle is deemed leased on the date upon which the lease of the eligible vehicle commences as specified in a signed lease agreement.

If an Applicant does not have access to a computer, the Applicant can call the toll-free MOR-EV number (1-866-900-4223) and the forms will be sent including the request for supporting documentation. The completed, signed application must be sent along with the required documentation within 90 days of the vehicle purchase or lease date. This paper application must contain all information regarding consumer directions that are found on the website.

Required documentation will include, at a minimum, the following:

- A copy of the Massachusetts registration certificate for the vehicle.
- A copy of the final sales contract with an itemization of credits, discounts, and incentives received (if applicable).
- Proof of Residency: A copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
- A document confirming income-eligibility. One of the following must be provided:
  - A tax transcript<sup>10</sup> for the Applicant, confirming the Applicant is not able to be claimed as a Dependent on another person's tax return **and** confirming a modified adjusted gross income (MAGI) below the applicable threshold:
    - \$150,000 for married filing jointly or a surviving spouse
    - \$112,500 for heads of households
    - \$75,000 for all other filers
  - A document confirming participation in one of the income-qualifying programs.<sup>11</sup>
- A completed and signed copy of the Used Vehicle Attestation Form.

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<sup>10</sup> <https://www.irs.gov/individuals/transcript-types-and-ways-to-order-them>

<sup>11</sup> See Appendix A, Document Guide for Income-Qualifying Programs. DOER and the Program Administrator will also maintain and up to date list of approved programs on the MOR-EV website, <https://mor-ev.org/cars-app#used>.



If the Program Administrator determines that an application or its required documents are incomplete, illegible, or missing required information, the Program Administrator will notify the Applicant of the error via email (or by phone, if the Applicant has applied via mail). The Applicant then shall have an additional 10 calendar days from the date of notification to correct any errors or omissions. If the Applicant fails to correct the errors or omissions within the additional 10 calendar days, the Program Administrator will cancel the application and will not release the reserved funds to the Applicant.

If the Program Administrator determines the Applicant is ineligible for a rebate, the Program Administrator will cancel the application and notify the Applicant via email (or by phone, if the Applicant has applied via mail). Applicants are responsible for ensuring that they receive and review these email communications. If the Program Administrator cancels a rebate application for a particular vehicle, Applicants may reapply for a rebate for that vehicle within 90 calendar days of the date of purchase or lease.

For applications that the Program Administrator has determined are complete, the Program Administrator will send a rebate check within 90 days of approval. Rebates will be paid in the order that complete rebate request application and supporting documentation is submitted to the Program Administrator prior to exhaustion of available rebate funds. Rebate checks must be cashed within 90 days of the check date. Checks not cashed within this timeframe will be cancelled, and the rebate amount will be returned to the MOR-EV fund.

### **3. MOR-EV+ (Income-Qualifying Rebate Adder)**

A rebate adder of \$1,500 is available to income-qualifying Massachusetts residents. The MOR-EV+ rebate adder can be combined with a MOR-EV Standard, MOR-EV Used or MOR-EV Trucks rebate. Vehicle eligibility requirements and program conditions of the respective MOR-EV Standard, MOR-EV Used, or MOR-EV Trucks rebate apply.

#### **3.1 Applicant Eligibility**

Massachusetts residents who participate in one of the following state or federal income-qualifying assistance programs qualify for the MOR-EV+ rebate adder:

- Residential Assistance for Families in Transition (RAFT)
- Prescription Drug Assistance
- Child Care Financial Assistance (CCFA)
- Mass Save Income Eligible Programs
- Supplemental Nutrition Assistance Program (SNAP)
- Massachusetts Rental Voucher Program (MRVP)
- Low-Income Home Energy Assistance Program (LIHEAP)
- Massachusetts Health Connector

- Supplemental Security Income (SSI)
- State Supplement Program
- Mass Health
- Massachusetts Health Safety Net
- Massachusetts Transitional Aid to Families with Dependent Children (TAFDC)
- Low-Income Weatherization Assistance Program (LIWAP)
- Emergency Aid to the Elderly, Disabled, and Children (EAEDC)
- Section A8 Housing Choice Voucher Program (HCVP)
- Women, Infants, and Children Program Nutrition Program (WIC)
- Veterans Programs (Chapter 115 Benefits)
- Veterans Dependency and Indemnity Compensation (DIC) Surviving Parent
- Veterans Affairs Non-Service-Connected Pension (VANSCP)

### **3.2 Vehicle Eligibility**

The MOR-EV+ rebate adder can be combined with rebates for purchases or leases that meet the eligible vehicle criteria for MOR-EV Standard, MOR-EV Used, or MOR-EV Trucks.

### **3.3 Application Process: Prequalification and MOR-EV+ at Point-of-Sale**

There are two processes through which an eligible Applicant can claim a MOR-EV+ rebate adder: At the point of sale or lease concurrently with a MOR-EV Standard or MOR-EV Used rebate upon receiving an approved prequalification voucher that is presented to the dealership at time of purchase or lease, or by applying online post purchase concurrently with a MOR-EV Standard or MOR-EV Used rebate with supporting documentation within 90 days of the purchase or lease date. Eligible Applicants who have already received a MOR-EV Standard or MOR-EV Used rebate at the time of purchase or lease but did not concurrently claim the MOR-EV+ rebate adder will be ineligible to receive this rebate post purchase. MOR-EV Trucks is only available as a post-purchase rebate; see Section 4 of this guideline for more information.

#### **3.3.1 Prequalification and Rebate Adder at Point of Sale or Lease**

Eligible Applicants can apply online via the application portal at <https://apply.mor-ev.org/> for a prequalification voucher and then bring the approved voucher to a participating dealership to receive a MOR-EV+ rebate adder at the point of sale. Once an application is started in the application portal, it must be completed and submitted within 15 days. Prequalification vouchers must be redeemed within 6 months of the date of voucher approval. Vouchers not redeemed within 6 months of approval will expire and Applicants will need to re-apply if the vehicle has not yet been purchased or leased. Prequalification vouchers are non-transferable between individuals including (but not limited to) spouses, family, and household members. The Applicant listed on the prequalification voucher approval is the only person eligible for the rebate. If the vehicle is purchased or leased prior to the approval of the prequalification voucher, the Applicant is not eligible to claim the rebate at the point of sale. Applicants must instead apply for the MOR-EV+ rebate concurrently with a MOR-EV Standard or MOR-EV Used rebate after completing the purchase or lease. Applicants who have already received a MOR-EV Standard or MOR-EV Used rebate at the time of purchase or lease but did not concurrently claim the MOR-EV+ rebate adder will be ineligible to receive the adder post-purchase.

If the Applicant does not have access to a computer, the Applicant will call the toll-free MOR-EV number (1-866-900-4223) and the forms will be sent including the request for supporting documentation. The completed, signed application must be sent along with the required documentation. This paper application must contain all information regarding consumer directions that are found on the website.

Required documentation will include, at a minimum, the following:

- Proof of Residency: A copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
- A document confirming participation in one of the income-qualifying programs.<sup>12</sup>

If the Program Administrator determines that an application or its required documents are incomplete, illegible, or missing required information, the Program Administrator will notify the Applicant of the error via email (or by phone, if the Applicant has applied via mail). The Applicant then shall have an additional 10 calendar days from the date of notification to correct any errors or omissions. If the Applicant fails to correct the errors or omissions within the additional 10 calendar days, the Program Administrator will cancel the application and will not issue a prequalification voucher.

If the Program Administrator determines the Applicant is ineligible for a prequalification voucher, the Program Administrator will cancel the application and notify the Applicant via email (or by phone if the applicant has specifically requested to be contacted via phone). Applicants are responsible for ensuring that they receive and review these email communications. If the Program Administrator cancels a prequalification voucher application, Applicants may reapply for a voucher as long as rebate funds are available.

For applications that the Program Administrator has determined are complete, the Program Administrator will send an approval email and voucher identification (ID) number via email.

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<sup>12</sup> See Appendix A, Document Guide for Income-Qualifying Programs. DOER and the Program Administrator will also maintain and up to date list of approved programs on the MOR-EV website, <https://mor-ev.org/cars-app#used>.

Applicants with prequalification approval must inform the dealership of their intent to redeem their voucher at the point of sale to receive the MOR-EV+ adder. Applicants must bring the following documents to a participating dealership to claim the MOR-EV+ rebate adder when they purchase or lease an eligible vehicle:

- Copy of the approved MOR-EV+ prequalification voucher.
- Individuals: a copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
  - i. Individuals who do not have a Massachusetts driver's license are required to provide 1) a legible copy of an alternate unique identifier, such as an out of state driver's license or state identification card, and 2) one of these alternate forms of proof of residency:
    - A utility or cable bill addressed to the applicant dated within the last three months showing a Massachusetts service address.
    - A copy of the current Massachusetts RMV registration of another vehicle in the name of the purchaser or lessee that is valid at the time of the application. A registration for a planned non-operational vehicle does not meet this requirement.
    - A signed, dated, and notarized Massachusetts residential rental agreement.
    - Military orders for active-duty military members stationed in Massachusetts but with permanent residency in another state.

If the applicant is unable to provide one of the approved options listed above, the Program Administrator may approve alternative forms of residency on a case-by-case basis. The Applicant must provide the Participating Dealership with a copy of the alternative residency approval email from the Program Administrator along with the approved alternative proof of residency; the Participating Dealership must include copies of both along with other supporting documentation when requesting rebate reimbursement.

The Participating Dealership must apply the MOR-EV+ rebate adder at time of purchase or lease and the following documents are required for the dealer to complete the rebate application:

- A copy of the Applicant Terms & Conditions is required to be signed by the consumer at the dealership for the point-of-sale program.
- A copy of the Rebate Transfer Acknowledgement Form is required to be signed by both the consumer and the dealership representative at the dealership for the point-of-sale program.
- A copy of the final sales or lease contract with an itemization of credits, discounts, and incentives received, if applicable. Both the Applicant (consumer) and the dealership must be listed on the document. All pages must be present and legible.
- A copy of the Massachusetts registration certificate for the vehicle.

### 3.3.2 Rebate Adder Post Purchase or Lease

Eligible Applicants can apply post-purchase for the MOR-EV+ rebate adder alongside their application for a MOR-EV Standard, MOR-EV Used or MOR-EV Trucks rebate online within 90 days of the date of purchase or lease. Eligible Applicants who have already received a MOR-EV Standard or MOR-EV Used rebate at the time of purchase or lease but did not concurrently claim the MOR-EV+ rebate adder will be ineligible to receive this rebate post-purchase. Once an application is started in the application portal, it must be completed and submitted within 15 days.

Eligible Applicants who purchased a qualifying new or used light-duty BEV or FCEV on or after November 10, 2022, have until November 6, 2023, to submit an application for the MOR-E+ rebate adder.

Required documentation will include, at a minimum, the following:

- Proof of Residency: A copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
- A document confirming participation in one of the income-qualifying programs<sup>13</sup>:

Please review sections 1.4 (MOR-EV Standard), 2.4 (MOR-EV Used), or 3.4 (MOR-EV Trucks) for details on the respective application processes and required documentation.

## **4. MOR-EV Trade-In (Internal Combustion Engine Vehicle Trade-In Rebates)**

Starting December 6, 2023, a rebate of \$1,000 is available to Massachusetts residents who have traded in an eligible Internal Combustion Engine Vehicle (ICEV) for a Qualifying Zero Emission Vehicle on or after August 8, 2023. MOR-EV Trade-In is in addition to the MOR-EV Standard, Used, and/or MOR-EV+ rebates. The MOR-EV Trade-In offering is not offered as an additional rebate to the MOR-EV Trucks rebate.

### **4.1 Applicant Eligibility**

An eligible Applicant must be a private individual who is a resident of Massachusetts. Proof of Massachusetts residency will be required to complete a MOR-EV Trade-In application. Corporations and other entities are not eligible to apply.

Active-duty military members stationed in Massachusetts with a temporary Massachusetts residential address, but with permanent residency in another state, are eligible to apply and may use military orders in lieu of other proof of residency documentation.

### **4.2 Vehicle Eligibility and Rebate Amounts**

ICEVs must meet the following criteria to be eligible for a MOR-EV Trade-In rebate:

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<sup>13</sup> See Appendix A, Document Guide for Income-Qualifying Programs. DOER and the Program Administrator will also maintain and up to date list of approved programs on the MOR-EV website, <https://mor-ev.org/cars-app#used>.

- Have been traded-in on or after August 8, 2023, for the purchase or lease of a Qualifying Zero Emission Vehicle.
- Have been up to date on inspections preceding the trade-in, demonstrated by providing a vehicle inspection report from [Massachusetts Vehicle Check](#).
  - The most recent inspection report must show that the vehicle passed all inspections in order to be considered up to do date.
- Have an internal combustion engine (typically fueled by gasoline or diesel), not including hybrid or plug-in hybrid vehicles.
- Be at least 12 years old, based on the model year, at the time of trade-in.
- Have Market Value, demonstrated by its trade-in value subtracted on the purchase or lease agreement for a Qualifying Zero Emission Vehicle.
- Have a GWVR of 8,500 pounds or less.
- Be traded-in at a Licensed Dealership at the time of purchase or lease of a Qualifying Zero Emission Vehicle.
- Have been registered in Massachusetts to the Applicant or the Applicant's immediate family for at least two years prior to the trade-in date.

### **4.3 Other Eligibility Requirements and Program Conditions**

Applicants can apply for the MOR-EV Trade-In rebate alongside a MOR-EV Standard, MOR-EV Used and/or MOR-EV+ application post-purchase or lease or can apply online after having received a corresponding MOR-EV rebate at a Participating Dealership for a Qualifying Zero Emission Vehicle.

### **4.4 Application Process**

Applicants can apply for the MOR-EV Trade-In rebate online within 90 calendar days of the ICEV trade-in date, which must be concurrent with the purchase or lease date of a Qualifying Zero Emission Vehicle.<sup>14</sup> Applicants who traded-in an eligible ICEV between August 8, 2023, and December 6, 2023, have until March 5, 2024, to apply for the MOR-EV Trade-In rebate. Approved Applicants will receive the MOR-EV Trade-In rebate check by mail.

The Applicant must apply and submit required documentation via the online application portal at <https://apply.mor-ev.org>.

Required documentation for MOR-EV Trade-In includes:

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<sup>14</sup> For rebate purposes, the trade-in date must be the same as the day that the purchase and sales agreement has been signed for a Qualifying Zero Emission Vehicle and that vehicle enters the consumer's possession. Alternatively, this would be the date that a Qualifying Zero Emission Vehicle is deemed leased on the date upon which the lease of the eligible vehicle commences as specified in a signed lease agreement.

- A copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
  - i. Individuals who do not have a Massachusetts driver's license are required to provide 1) a legible copy of an alternate unique identifier, such as an out of state driver's license or state identification card, and 2) one of these alternate forms of proof of residency:
    - A utility or cable bill addressed to the applicant dated within the last three months showing a Massachusetts service address.
    - A copy of the current Massachusetts RMV registration of another vehicle in the name of the purchaser or lessee that is valid at the time of the application. A registration for a planned non-operational vehicle does not meet this requirement.
    - A signed, dated, and notarized Massachusetts residential rental agreement.
    - Military orders for active-duty military members stationed in Massachusetts but with permanent residency in another state.

If the applicant is unable to provide one of the approved options listed above, the Program Administrator may approve alternative forms of residency on a case-by-case basis.

- A copy of the Massachusetts registration certificate for the associated Qualifying Zero Emission Vehicle (i.e., the vehicle that received a MOR-EV Standard or MOR-EV Used rebate).
- A copy of the final sales or lease contract with an itemization of credits, discounts, and incentives received and the value of the traded-in ICEV subtracted.
- A copy of the Massachusetts registration certificate for the traded-in ICEV.
- A copy of the ICEV inspection report from [Massachusetts Vehicle Check](#).
- A signed copy of the [MOR-EV Trade-In Vehicle Attestation Form](#).

#### **4.4.1 Application Process for Retroactive Applications**

Applicants who have already received a MOR-EV Rebate post purchase or at the point of sale through a participating dealership and want to apply for the MOR-EV Trade-In rebate retroactively, must follow the steps below:

Applicants who have applied for a MOR-EV Standard, Used or + rebate post purchase:

1. The applicant must wait until their original application has been paid before applying for a Trade-In rebate.
2. Once the applicant has received an email notification that their rebate check has been mailed or the application status in their dashboard has switched to “paid”, the applicant must contact the Program Administrator via phone or email to request their original application to be opened again to add the Trade-In rebate.

3. After the application has been re-opened, the applicant must log into their existing online account and upload the required documents for the Trade-In rebate and submit the application.

Applicants who prequalified and have received a MOR-EV Used or + rebate at the point of sale:

1. The applicants must wait until the original application submitted by their dealership has been paid before applying for a Trade-In rebate.
2. Once the dealer has been paid, an email notification will be sent to the applicant inviting them to participate in the MOR-EV program survey. At this point, the applicant must contact the Program Administrator via phone or email to request their original prequalification application to be opened again to add the Trade-In rebate.
3. After the application has been re-opened, the applicant must log into their existing online account and upload the required documents for the Trade-In rebate and submit the application.

Applicants who have received a MOR-EV Standard rebate at the point of sale:

1. The applicant must wait until the original application submitted by their dealership has been paid before applying for a Trade-In rebate.
2. Once the dealer has been paid, an email notification will be sent to the applicant inviting them to participate in the MOR-EV program survey. At this point, the applicant must contact the Program Administrator via phone or email to request a Trade-In application.
3. After the application has been opened, the applicant must create an online account via <https://apply.mor-ev.org> using the same email address and driver's license number that was given to the dealership for the point-of-sale application. The applicant must then log into their new online account and upload the required documents for the Trade-In rebate and submit the application.

If the Program Administrator determines that an application or its required documents are incomplete, illegible, or missing required information, the Program Administrator will notify the Applicant of the error via email (or by phone, if the Applicant has applied via mail). The Applicant then shall have an additional 10 calendar days from the date of notification to correct any errors or omissions. If the Applicant fails to correct the errors or omissions within the additional 10 calendar days, the Program Administrator will cancel the application and will not release the reserved funds to the Applicant.

If the Program Administrator determines the Applicant is ineligible for a rebate, the Program Administrator will cancel the application and notify the Applicant via email (or by phone, if the Applicant has applied via mail). Applicants are responsible for ensuring that they receive and review these email communications. If the Program Administrator cancels a rebate application for a particular vehicle, Applicants may reapply for a rebate for that vehicle within 90 calendar days of the date of purchase or lease.



For applications that the Program Administrator has determined are complete, the Program Administrator will send a rebate check within 90 days of approval. Rebates will be paid in the order that complete rebate request application and supporting documentation is submitted to the Program Administrator prior to exhaustion of available rebate funds. Rebate checks must be cashed within 90 days of the check date. Checks not cashed within this timeframe will be cancelled, and the rebate amount will be returned to the MOR-EV fund.

## **5. MOR-EV Trucks (New Pickup Truck Rebates)**

MOR-EV Trucks offers a \$7,500 rebate for the purchase or lease of eligible new on-road battery electric or fuel-cell electric pickup trucks with a GVWR between 6,000 and 10,000 pounds or a new on-road battery electric or fuel-cell electric vehicle of any body type with a GVWR between 8,501-10,000 pounds.

### **5.1 Applicant Eligibility**

The following individuals and entities are eligible to receive a MOR-EV Trucks rebate:

- Massachusetts residents.
- Private businesses licensed to do business in Massachusetts.
- Non-profit organizations licensed to operate in Massachusetts.
- Educational institutions, such as schools, colleges, and universities.
- Local, Tribal, Municipal and State governments and departments.

### **5.2 Vehicle Eligibility**

Vehicles must meet the following criteria to be eligible for a rebate:

The vehicle must be a New battery electric vehicle (BEV) or a fuel cell electric vehicle (FCEV) that has been manufactured primarily for use on public streets, roads, and highways. A list of eligible vehicle models<sup>15</sup> is maintained on the MOR-EV website at <https://mor-ev.org/eligible-vehicles-trucks>. For MOR-EV Trucks rebates, this list includes:

- Pickup trucks must have a gross vehicle weight rating (GVWR) between 6,000 and 10,000 pounds, and BEVs or FCEVs of any body type must have a GVWR between 8,501-10,000.

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<sup>15</sup> The MOR-EV Trucks List of Eligible Vehicle Models will be periodically updated as vehicle models are approved. The Original Equipment Manufacturer (OEM) must reach out to MOR-EV for eligibility consideration and provide Vehicle Identification Number (VIN) decipherment and a marketing photo of the vehicle. If the vehicle meets the eligibility requirements set forth above, then the Program Administrator will add the vehicle to the List of Eligible Vehicle Models. Vehicle makes and models will be listed along with vehicle photographs on the website by the Program Administrator within one business day after the vehicle is approved. New model years of vehicles already approved for MOR-EV eligibility can be rebated prior to the new model year being added to the List of Eligible Vehicle Models as long as the vehicle still meets all current program eligibility guidelines.. All other new vehicle models purchased before being on the List of Eligible Vehicle Models are not rebate eligible.

- Have a Sales Price<sup>16</sup> (total MSRP) of \$80,000 or less.

### 5.3 Other Eligibility Requirements and Program Conditions

Applicants must acknowledge and adhere to the following requirements to receive a MOR-EV Trucks rebate:

- Applicants must retain ownership of the vehicle for a minimum of 36 consecutive months from the vehicle purchase or lease date.
  - a. For purchases, the new vehicle must maintain registration with the Massachusetts RMV for a minimum of 36 consecutive months for use in Massachusetts.
  - b. For leases, the lease term must be at least 36 months for program eligibility.
- Register the new vehicle with the Massachusetts RMV for a minimum of 36 consecutive months for use in the Commonwealth.
- Applicants must not make or allow any modifications to the vehicle's emissions control systems, hardware, or software calibrations.
- Applicants must agree that any emission reductions generated by the purchased vehicle will not be used as marketable emission reduction credits, to offset any emission reduction obligation of any person, or to generate a compliance extension or extra credit for determining regulatory compliance.
- DOER reserves the right to request voluntary participation from rebate recipients in ongoing research efforts that support MOR-EV and DOER goals.

### 5.4 Application Process

#### Post Purchase or Lease

Eligible Applicants can apply for the MOR-EV Trucks rebate online within 90 calendar days of purchasing or leasing an eligible new vehicle. For rebate purposes, the date of purchase is the day that the purchase and sales agreement has been signed. For rebate purposes, a vehicle is deemed leased on the date upon which the lease of the eligible vehicle commences as specified in a signed lease agreement.

To begin the rebate application process, Applicants must submit copies of the following documents to the Program Administrator at [mor-evtrucks@energycenter.org](mailto:mor-evtrucks@energycenter.org):

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<sup>16</sup> The Sales Price at the time of sale or lease includes all costs associated with a vehicle as recommended by the manufacturer (i.e. the total manufacturer suggested retail price (MSRP). It encompasses the base price of the vehicle, additional features, and packages (including but not limited battery upgrades, autonomous upgrades, wheel and tire packages, paint options, audio and infotainment system) and destination charges as suggested by the manufacturer and listed on the vehicle's Monroney label or window sticker. The Sales Price does not include any OEM or dealership discounts, applicable taxes, registration fees, vehicle pre-order or ordering fees, documentation fees or additional maintenance or repair packages purchased from the dealership.

- Signed Applicant Terms and Conditions.
- Purchase or Lease Agreement complete with:
  - Buyer or lessee's name and address
  - Date of purchase or lease
  - Sales Price
  - Vehicle Identification Number (VIN)
  - Signature of buyer or lessee
- Massachusetts vehicle registration
- Proof of residency
  - If applying as an individual, a copy of a Massachusetts driver's license or other valid form of Massachusetts residency as approved by the Program Administrator.
  - If applying as an organization such as a business, nonprofit, etc., a copy of a local business license, articles of incorporation, articles of organization, statement of information, or other formation document filed with the Massachusetts Secretary of State. Other forms of documentation, such as a written attestation, may be accepted by DOER on a case-by-case basis. Please contact the Program Administrator for more information.

If the Program Administrator determines that an application or its required documents are incomplete, illegible, or missing required information, the Program Administrator will notify the Applicant of the error via email (or by phone, if the Applicant has applied via mail). The Applicant then shall have an additional ten (10) calendar days from the date of notification to correct any errors or omissions. If the Applicant fails to correct the errors or omissions within the additional ten (10) calendar days, the Program Administrator will cancel the application and will not release the reserved funds to the Applicant.

If the Program Administrator determines the Applicant is ineligible for a rebate, the Program Administrator will cancel the application and notify the Applicant via email via email (or by phone if the applicant has specifically requested to be contacted via phone). Applicants are responsible for ensuring that they receive and review these email communications. If the Program Administrator cancels a rebate application for a particular vehicle, Applicants may reapply for a rebate for that vehicle within 90 calendar days of the date of purchase or lease.

For applications that the Program Administrator has determined are complete, the Program Administrator will send a rebate check within 90 days of approval. Rebates will be paid in the order that complete rebate request application and supporting documentation is submitted to the Program Administrator prior to exhaustion of available rebate funds. Rebate checks must be cashed within 90 days of the check date. Checks not cashed within this timeframe will be cancelled, and the rebate amount will be returned to the MOR-EV fund.

## 6. MOR-EV Class 3-8 Vehicles (New Medium- and Heavy-Duty Vehicle Rebates)

MOR-EV offers rebates for the purchase or lease of eligible new on-road battery electric or fuel-cell electric vehicles with a GVWR above 10,000 pounds and with a Sales Price of \$2,000,000 or less. For MOR-EV Medium and Heavy-Duty rebates, an application for a MOR-EV rebate reservation voucher must be submitted and approved prior to taking delivery of an eligible vehicle.

### 6.1 Applicant Eligibility

The following individuals and entities are eligible to receive a MOR-EV Trucks rebate:

- Massachusetts residents.
- Private businesses licensed to do business in Massachusetts.
- Non-profit organizations licensed to operate in Massachusetts.
- Educational institutions, such as schools, colleges and universities.
- Local, Tribal, Municipal and State governments and departments.

### 6.2 Vehicle Eligibility

A list of eligible vehicle models<sup>17</sup> is maintained on the MOR-EV website at <https://mor-ev.org/eligible-vehicles-trucks>. Vehicles must meet the following criteria to be eligible for a rebate:

- Vehicle must be a New battery electric vehicle (BEV) or a fuel cell vehicle (FCEV) that has been manufactured primarily for use on public streets, roads, and highways.
- Have a GVWR over 10,000 pounds.
- Have a Sales Price<sup>18</sup> (total MSRP) of \$2,000,000 or less.

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<sup>17</sup> The MOR-EV Medium- and Heavy-Duty List of Eligible Vehicle Models will be periodically updated as vehicle models are approved. If the vehicle meets the eligibility requirements set forth above, then the Program Administrator will add the vehicle to the List of Eligible Vehicle Models. Vehicle makes and models will be listed along with vehicle photographs on the website by the Program Administrator within one business day after the vehicle is approved. New model years of vehicles already approved for MOR-EV eligibility can be rebated prior to the new model year being added to the List of Eligible Vehicle Models, as long the new model year still meets all current MOR-EV eligibility requirements. All other new vehicle models purchased before being on the List of Eligible Vehicle Models are not rebate eligible.

<sup>18</sup> The Sales Price at the time of sale or lease includes all costs associated with a vehicle as recommended by the manufacturer (i.e. the total manufacturer suggested retail price (MSRP). It encompasses the base price of the vehicle, additional features, and packages (including but not limited battery upgrades, autonomous upgrades, wheel and tire packages, paint options, audio and infotainment system) and destination charges as suggested by the manufacturer and listed on the vehicle's Monroney label or window sticker. The Sales Price does not include any OEM or dealership discounts, applicable taxes, registration fees, vehicle pre-order or ordering fees, documentation fees or additional maintenance or repair packages purchased from the dealership.

### 6.3 Rebate Values and Rebate Blocks

Rebate values are designated by vehicle weight class and will decline as each block of rebates is claimed.<sup>19</sup>

There will be three blocks with a minimum number of 200 rebates per block.<sup>20</sup> These rebate blocks are inclusive of eligible vehicles from any applicable weight class, i.e., there is no limitation on how many vehicles from a specific weight class may claim rebates from a block. The MOR-EV website will post regular updates to the number of remaining rebates available in each block.

As illustrated below, rebate values decline by 15% following each full block. Rebates will remain static at Block 3 values until the Department of Energy Resources completes a program review. Vehicle End Users<sup>21</sup> may only reserve a maximum of 10% of an available rebate block; subsequent rebates to that Vehicle End User will be at the following block decline regardless of whether the previous block is exhausted.

Vehicle Class	GVWR (lbs.)	Incentive Amount Block 1	Incentive Amount Block 2	Incentive Amount Block 3
3	10,001-14,000	\$15,000	\$12,750	\$10,838
4	14,001-16,000	\$30,000	\$25,500	\$21,675
5	16,001-19,500	\$45,000	\$38,250	\$32,513
6	19,501-26,000	\$60,000	\$51,000	\$43,350
7	26,0001-33,000	\$75,000	\$63,750	\$54,188
8	33,001+	\$90,000	\$90,000	\$65,028

### 6.4 Other Eligibility Requirements and Program Conditions

Any Applicant, and the Vehicle End User if distinct from the Applicant, must acknowledge and adhere to the following requirements to receive a MOR-EV Medium- and Heavy-Duty Vehicle rebate:

- Applicants must retain ownership of the vehicle for a minimum of 48 consecutive months from the vehicle purchase or lease date.

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<sup>19</sup> Blocks under the MOR-EV Regulations started on August 8, 2023. Voucher requests submitted before this date are considered under the previous program and will not count towards block limits.

<sup>20</sup> The draw down of Block 1 rebates started on August 8, 2023; MOR-EV Medium- and Heavy-Duty voucher requests approved prior to this date are not retroactively deducted from this allocation.

<sup>21</sup> The individual or entity that operates an eligible vehicle. This may be the owner of the vehicle or a different individual or entity under a lease agreement.

- a. For purchases, the new vehicle must maintain registration with the Massachusetts RMV for a minimum of 48 consecutive months for use in Massachusetts.
- b. For leases, the lease term must be at least 48 months for program eligibility.
- Register the new vehicle with the Massachusetts RMV for a minimum of 48 consecutive months for use in the Commonwealth.
- Applicants must not make or allow any modifications to the vehicle’s emissions control systems, hardware, or software calibrations.
- Applicants must agree that any emission reductions generated by the purchased vehicle will not be used as marketable emission reduction credits, to offset any emission reduction obligation of any person, or to generate a compliance extension or extra credit for determining regulatory compliance.
- MOR-EV Medium- and Heavy-Duty rebates will not be provided to vehicle purchases or leases which receive incentive funds from other Massachusetts programs, either funded or managed by the Commonwealth. At no time may an Applicant receive funding that exceeds 100% of the total cost of an eligible vehicle.
- MOR-EV Medium- and Heavy-Duty rebate recipients will be subject to a data provision requirement, which shall require reporting to the DOER the vehicle miles traveled at a minimum during the first year of operation to inform future programs and policies. Additional vehicle operational data may be requested by DOER.

## **6.5 Application Process**

Eligible Applicants seeking a MOR-EV Medium- and Heavy-Duty rebate must follow a two-stage process to receive a rebate. An application for a MOR-EV rebate reservation voucher must be submitted and approved prior to taking delivery of an eligible vehicle. Once a rebate reservation voucher request has been approved, an official voucher will be issued to the Applicant that can be redeemed upon taking delivery of the eligible vehicle.

### **6.5.1 Step 1: Rebate Reservation Voucher Application**

To begin the voucher application process, Applicants must submit copies of the following documents to the Program Administrator at [mor-evtrucks@energycenter.org](mailto:mor-evtrucks@energycenter.org):

- Signed Program Applicant Terms and Conditions.
- Proof of Intent to Purchase including the sales price and GVWR, such as:
  - Purchase Order.
  - Reservation agreement with deposit of at least 10% of quoted vehicle price.
  - Signed bulk purchase participant agreement.
  - A signed letter of intent with a description of the vehicle(s) that will be purchased/leased.

- Proof of residency.
  - If applying as an individual, a copy of a Massachusetts driver license or other valid form of Massachusetts residency as approved by the Program Administrator.
  - If applying as an organization such as a business, nonprofit, etc., a copy of a local business license, articles of incorporation, articles of organization, statement of information, or other formation document filed with the Massachusetts Secretary of State. Other forms of documentation, such as a written attestation, may be accepted by DOER on a case-by-case basis. Please contact the Program Administrator for more information.
  - If applying as an educational institution, municipality, state or tribal government, or other public entity, Applicants may provide a signed letter of attestation.
- If applying for the MOR-EV Environmental Justice rebate adder (see Section **7Error! Reference source not found.**), submit a copy of an Operational Route Map, Delivery Site, or Driver Assignment Documentation.

If the Program Administrator determines that a rebate reservation voucher application or its required documents are incomplete, illegible, or missing required information, the Program Administrator will notify the Applicant of the error via email (or by phone, if the Applicant has applied via mail). The Applicant then shall have an additional 10 calendar days from the date of notification to correct any errors or omissions. If the Applicant fails to correct the errors or omissions within the additional 10 calendar days, the Program Administrator will cancel the application.

If the Program Administrator determines the Applicant is ineligible for a rebate reservation voucher, the Program Administrator will cancel the application and notify the Applicant via email (or by phone if the applicant has specifically requested to be contacted via phone). Applicants are responsible for ensuring that they receive and review these email communications. If the Program Administrator cancels a rebate reservation voucher application for a particular vehicle, Applicants may reapply for a rebate reservation voucher at any time as long as funds are available.

#### 6.5.2 Voucher Approval, Effective Date, and Extensions

Vouchers are approved and issued by DOER. Applicants must redeem a voucher within 12 months per the effective date listed in the voucher document. Applicants may apply for a voucher extension at any point within the 12-month effective period following the initial voucher approval. Voucher extensions are available for up to an additional 12 months. An additional extension may be granted for demonstrated good cause. A voucher that is not extended or redeemed within 12 months will be deemed expired and canceled. Extensions may be granted solely at DOER’s discretion and are not guaranteed to be approved.

#### 6.5.3 Step 2: Post Purchase Rebate Claim Process

To redeem an approved voucher and to claim a rebate upon taking delivery of the eligible vehicle, Applicants must submit copies of the following documents within 12 months of the voucher effective period to the Program Administrator at [mor-evtrucks@energycenter.org](mailto:mor-evtrucks@energycenter.org):

- Copy of originally issued voucher with unique voucher identification number.

- Copy of Massachusetts registration for vehicle.
- Copy of signed Program Applicant Terms and Conditions.
- Proof of payment or lease (one of the following required):
  - Final paid invoice/receipt for purchase.
  - Final bulk purchase participant agreement.
  - Final lease contract including length of term.

If the Program Administrator determines that a rebate claim or its required documents are incomplete, illegible, or missing required information, the Program Administrator will notify the Applicant of the error via email (or by phone, if the Applicant has applied via mail). The Applicant then shall have an additional 30 calendar days from the date of notification to correct any errors or omissions. If the Applicant fails to correct the errors or omissions within the additional 30 calendar days, the Program Administrator will cancel the application and will not release the reserved funds to the Applicant.

If the Program Administrator determines the Applicant is ineligible for a rebate, the Program Administrator will cancel the rebate application and notify the Applicant via email (or by phone if the applicant has specifically requested to be contacted via phone). Applicants are responsible for ensuring that they receive and review these email communications.

For applications that the Program Administrator has determined are complete, the Program Administrator will send a rebate check within 90 days of approval. Rebates will be paid in the order that complete rebate request application and supporting documentation is submitted to the Program Administrator prior to exhaustion of available rebate funds. Rebate checks must be cashed within 90 days of the check date. Checks not cashed within this timeframe will be cancelled, and the rebate amount will be returned to the MOR-EV fund.

## **7. Environmental Justice Rebate Adder (MOR-EV Class 3-8 Vehicle Rebates)**

Eligible Applicants may apply for the Environmental Justice Rebate Adder as part of their MOR-EV Medium-and Heavy-Duty rebate. The Environmental Justice Rebate Adder raises the value of the applicable MOR-EV Medium-and Heavy-Duty rebate by an additional 10%. The Environmental Justice Rebate Adder offering is not available to be combined with the MOR-EV Standard, MOR-EV Used, MOR-EV+, or MOR-EV Trucks rebates.

### **7.1 Applicant Eligibility**

Applicants or vehicle end users with eligible vehicles that are registered in or are operating more than 50% of the time within census block groups that meet at least one of the Massachusetts' Environmental Justice Population Criteria<sup>22</sup> are eligible for the adder.

### **7.2 Application Process**

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<sup>22</sup> <https://www.mass.gov/info-details/environmental-justice-populations-in-massachusetts>



Eligible Applicants must apply for the Environmental Justice Adder when they apply for the MOR-EV Medium-and Heavy-Duty rebate reservation voucher. Information demonstrating registration location or operations must be provided to the Program Administrator via email at [mor-evtrucks@energycenter.org](mailto:mor-evtrucks@energycenter.org) as part of the voucher application.

## **8. Failure to Adhere to the Program Requirements**

If a vehicle for which a rebate payment was issued is sold, returned, or traded in, or if a lease is transferred or assumed by another party prior to expiration of the minimum ownership period or lease agreement, or if the vehicle moves out of state, the purchaser or lessee may be required to reimburse the Program. Exemption from the minimum ownership period may be allowed if necessitated by unforeseen or unavoidable circumstances, such as military relocation outside the Commonwealth of Massachusetts, death of an Applicant, or determination by the Program Administrator that the vehicle has been totaled.

To qualify for an exemption, Applicants will be required to submit a written request to the Program Administrator and include official documentation demonstrating proof of one of the above noted circumstances. The Program Administrator will review all submitted exemption requests and respond back with either an approval, denial, or request for additional documentation.

To request an exemption for a special circumstance other than those listed above, an Applicant can submit a written request explaining the circumstances along with any official corresponding documentation. The Program Administrator will review the exemption request with DOER to determine if the requirements for an exemption have been met.

## **9. Appeal Process**

DOER will consider appeals to the denial of a rebate application, in full or in part, on a case-by-case basis. To request an appeal, a participating dealership, licensed dealership, or Applicant must contact the Program Administrator and initiate the appeals process within 90 calendar days of the date of application denial. The appeal must include all facts and required supporting documents that form the basis for the appeal.

Any appeals submitted more than 90 days following application denial will not be eligible for review and consideration. In instances where the initial 90-day application window was missed, appeals may be granted on a case-by-case basis no more than 6 months following the purchase or lease date of the eligible vehicle.

Failure of a dealer to advise a consumer of the MOR-EV Program or the provision of false or incorrect information from a dealer to a consumer does not form the basis for appeal.

Appeals for vehicle purchases or leases that exceed the maximum price cap will be denied.

If the only basis for the appeal is that the Applicant or dealership disagrees with the policies set forth in these regulations, the MOR-EV Terms and Conditions, any relevant Guidelines, or other MOR-EV policy, the appeal will be denied.

To begin the appeal process, contact the Program Administrator at [MOR-EV@energycenter.org](mailto:MOR-EV@energycenter.org).

## Appendix A: Document Guide for Income-Qualifying Programs

**MOR-EV+ (and/or MOR-EV Used Applicants who are applying under the income-based assistance program eligibility pathway) must submit a document or membership card that, at minimum, provides all the following:**

- Applicant Name.
- Name of qualifying program (see below).
- The government entity or managed care organization that issued the document.
- An issue date within the last 12 months or a future expiration date beyond the date of MOR-EV application and approval.

Table 1: List of Income-Qualifying Programs and Acceptable Documentation

<b>Program Name</b>	<b>Acceptable Documentation</b>
Child Care Financial Assistance (CCFA)	EEC Waitlist Confirmation Letter or EEC Funding Availability Letter
Supplemental Nutrition Assistance Program (SNAP)	SNAP notice of eligibility
Women, Infants, and Children Program Nutrition Program (WIC)	Award letter or notice of approval
Residential Assistance for Families in Transition (RAFT)	Award letter or notice of approval
Massachusetts Rental Voucher Program (MRVP)	Award letter or notice of approval
Section A8 Housing Choice Voucher Program (HCVP)	HCVP letter of eligibility or issued voucher
Supplemental Security Income (SSI)	Benefits verification letter
State Supplement Program (SSP)	Award letter or notice of approval
Massachusetts Transitional Aid to Families with Dependent Children (TAFDC)	Award letter or notice of approval
Emergency Aid to the Elderly, Disabled, and Children (EAEDC)	Award letter or notice of approval
Veterans Programs (Chapter 115 Benefits)	Benefits verification letter or notice of approval

Veterans Dependency and Indemnity Compensation (DIC) Surviving Parent	Benefits verification letter or notice of approval
Veterans Affairs Non-Service-Connected Pension (VANSCP)	Benefits verification letter or notice of approval
Prescription Drug Assistance (Prescription Advantage)	Award letter, notice of approval or member card
Massachusetts Health Connector	Health Connector Welcome Letter or qualifying insurance member ID card
MassHealth	MassHealth enrollment confirmation letter and MassHealth card
Massachusetts Health Safety Net	Benefits verification letter or notice of approval
Mass Save Income Eligible Programs	Award letter, notice of approval or utility bill
Low-Income Home Energy Assistance PROGRAM (LIHEAP)	LIHEAP letter of eligibility
Low-Income Weatherization Assistance Program (LIWAP)	LIWAP letter of eligibility