



Dependent Eligibility Verification Checklist

FIRST NAME LAST NAME

EMPLOYEE ID NUMBER

This Checklist Must Be Submitted With Documents To Be Considered Complete

Step 1: Determine Eligibility

- Using the (DEV) Matrix that is included in this package, confirm that each dependent listed below meets the CPChem Benefit Plan's eligibility criteria. The eligibility criterion is listed in the left-hand column of the DEV Matrix.
- For each eligible dependent, gather the listed acceptable supporting documentation. (Consult the Required Documentation for Proof of Eligibility within the right-hand column of the DEV Matrix.)
- Place an "X" in the "Documents Enclosed" box to the left of each eligible dependent for whom you are sending documentation. **Do not send original documents. They will not be returned.**
- If a dependent on the Checklist below is *not* eligible, place an "X" in the "Remove From Coverage" box to the right of that dependent's name. You do not need to provide documentation for current dependents for which you elect "Remove From Coverage"; these dependents will be removed from coverage.

Documents Enclosed	Dependent Name	Dependent Type	Date of Birth MM/DD/YYYY	Remove From Coverage
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>

Step 2: Date and Sign This Document

The above dependent(s) that have not been removed from coverage meet the dependent eligibility requirements for the Chevron Phillips Chemical Benefit Plans, and acceptable supporting document(s) are enclosed.

 Signature

 Date

Step 3: Submit This Completed, Signed, and Dated Checklist and Acceptable Supporting Documentation by one of the following two methods.

MAIL	FAX
Chevron Phillips Chemical Benefit Service Center P. O. Box 622 Des Moines, IA 50306-0622 Do not send original documents. They will not be returned. Certain states (including Texas) indicate on their birth certificates that it is illegal to make copies. In these instances, please provide a state-approved copy. Only regular mail can be received (no overnight/courier).	888-775-4064

More Information Needed?

For more information, please see DEV Frequently Asked Questions document.

Refer to the DEV Matrix attached if you need more information about the proof documents required for submission.

Need Help?

If you need further information related to your dependents, or about the specific types of documentation needed to meet the dependent eligibility requirements, contact the Chevron Phillips Chemical Benefit Service Center at 1-800-446-1422 (Press 1). The Service Center is open Monday through Friday from 8:00 am to 5:00 pm, US Central Time.

Important Note: All information provided in relation to this DEV process will remain confidential and will be protected from identity theft.



Dependent Eligibility Verification (DEV) Matrix

Eligible Dependent Definition	Required Documentation for Proof of Eligibility
<p>Legal Spouse</p> <p>A Spouse is a person who is legally married to the Employee, Retiree or Qualified Beneficiary in any jurisdiction, regardless of gender or state of residence.</p> <p>Provided however, that no Spouse shall qualify as a Dependent if any of the following conditions apply:</p> <ul style="list-style-type: none"> a) Such person is covered for benefits as an Employee; OR b) Such person is legally separated from the Employee, Retiree or Qualified Beneficiary; OR c) Such person is a member on active duty with the Armed Forces; OR d) Such person is a common law spouse or a domestic partner, even if such relationship is recognized in the state in which the individuals reside. (However, common law spouses covered under the ConocoPhillips plan and domestic partners covered under the Chevron Texaco plan as of December 31, 2000, who became participants in the plans described in the Employee Benefits Handbook on January 1, 2001, are considered dependents. Anyone grandfathered as a common law spouse or domestic partner under this plan provision who later loses coverage cannot reenter these plans.) <p>A widowed Spouse can maintain coverage until remarriage.</p> <p>Former spouses, even if medical coverage is mandated in the divorce decree, are not eligible for coverage under the CPChem Benefit Plans.</p> <p>“Qualified Beneficiary” means any person afforded rights of continued medical coverage under COBRA as a result of a qualifying event, as defined in COBRA and in the Health Plan document.</p>	<p>Please provide one of the following:</p> <ul style="list-style-type: none"> ○ Marriage Certificate: Must contain <ul style="list-style-type: none"> ● Name of the employee ● Name of the spouse ● Date of marriage ● Certifier’s signature/official seal, ○ Marriage License: Must contain <ul style="list-style-type: none"> ● Name of the employee ● Name of the spouse ● Date of marriage ● Certifier/ Officiant’s signature ○ Church/Justice of the Peace Marriage Certificate: Must contain <ul style="list-style-type: none"> ● Name of the employee ● Name of the spouse ● Date of marriage ● Certifier’s signature/official seal; <p><i>To maintain confidentiality, please black out Social Security Number and financial information.</i></p> <p>IRS Tax Return is not recognized by CP Chem as acceptable Spouse documentation.</p>
<p>Child of the Employee, Retiree, Qualified Beneficiary or Spouse</p> <p>Includes any of the following, in relation to an Employee, Retiree or Qualified Beneficiary:</p> <ul style="list-style-type: none"> a) A biological child b) A step child c) A legally adopted child d) A child legally placed for adoption e) A foster child f) A child under permanent legal guardianship 	<p>Please provide one of the following:</p> <ul style="list-style-type: none"> ○ Birth Certificate/Hospital Birth Record: Must contain <ul style="list-style-type: none"> ● Name of the employee or spouse ● Name of the child ● Date of birth; OR ○ Naturalization Certificate or Consular Report of Birth Abroad: Must contain <ul style="list-style-type: none"> ● Name of the employee or spouse ● Name of the child

In addition, the child must meet all of the following criteria:

- a) Must not be on active duty with the Armed Forces; AND
- b) Must not be covered for benefits as an Employee of the Company

The child must also meet one of the following criteria:

- a) Less than 26 years of age, regardless of marital¹, student or employment status; OR
- b) Your mentally or physically disabled eligible children² age 26 or older who are covered under the plan before they reached age 26 (newly-hired employees with incapacitated or disabled children² age 26 or over may be enrolled for coverage if they had prior medical coverage. You will need to contact the Chevron Phillips Benefits Service Center for required documentation); OR
- c) For purposes of the health care plans, a child² who is the subject of a valid Qualified Medical Child Support Order, as determined by the plan administrator

¹ For Dependent Life Insurance, the dependent child must be unmarried to be considered an eligible dependent.

² The definition of child includes biological children, stepchildren, foster children, legally adopted children, children legally placed for adoption and child under permanent legal guardianship.

- Date of birth; **OR**

- **Adoption Records:** Must contain

- Name of the employee or spouse
- Name of the child
- Notary signature or indication document has been filed in court; **OR**

- **Foster Child Records:** Must contain

- Name of the employee or spouse
- Name of the child
- Nature of relationship indicated as foster child
- Notary signature or indication document has been filed in court; **OR**

- **Divorce Decree, Custody Agreement, Court Order showing Permanent Legal Guardianship or Qualified Medical Child Support Order (QMCSO):** Must contain

- Name of the employee or spouse
- Name of the child
- Proof that the child is a biological child, foster child, legally adopted child, child legally placed for adoption, under permanent legal guardianship, in relation to the Employee, Retiree, or Qualified Beneficiary
- Statement of responsibility for health coverage for the child
- Notary signature or indication document has been filed in court



Dependent Eligibility Verification Frequently Asked Questions

Q1. What is the definition of an eligible dependent? What is acceptable proof of eligibility?

A: You can find the definitions of eligible dependents, along with the applicable Supporting Documents, within the DEV Matrix in this package.

Q2. Why is CPChem requiring proof of my dependent's eligibility under the CPChem Benefit Plans?

A: CPChem strives to provide you and your family with valuable benefit programs. To help maintain these programs, we must ensure that our dependent eligibility data are accurate and up-to-date. Having non-eligible dependents on our plans increases costs – both for you and for the Company. In addition, as fiduciary of the benefit plans, CPChem has a duty and responsibility to ensure that only eligible dependents are enrolled in the CPChem Benefit Plans.

Q3. What will happen if I do not respond, or if I submit an incomplete response?

A: It is important that you follow the instructions and respond with the required documentation by the due date, including signing, dating, and returning the Dependent Eligibility Verification (DEV) Checklist. If the required documentation has not been received by the **deadline quoted in your letter**, dependents with an incomplete verification status will be dropped from coverage under the CPChem Benefit Plans, with the effective the **termination date noted in your letter**. You will be notified by mail upon successful completion of the verification process.

Q4. Will my dependents dropped as a result of the DEV process be offered COBRA coverage?

A: No, termination from coverage as a result of this DEV process will not be considered a Qualified Status Change, therefore, COBRA coverage will not be offered to dependents dropped from coverage as a result of the DEV process.

Q5. What if I do not have a copy of my dependent's birth certificate, marriage certificate, etc.?

A: There are several resources available that can help you to obtain the required documentation.

Marriage Certificate: A copy of your marriage certificate may be obtained at the County Clerk's office in the county in which you were married.

Birth Certificate: Where to obtain a copy of a birth certificate varies by state. The local county Department of Health should be able to point you in the right direction. There is a website called www.VitalChek.com that also may assist you in obtaining a copy.

Other helpful resources for obtaining dependent documentation include the National Center for Health Statistics website at www.cdc.gov/nchs/w2w.htm and www.vitalrec.com.

Q6. My dependent was dropped from coverage as a result of this DEV process. When can I add my dependent back to coverage under the CPChem health plans?

A: Remember that you can only add dependents that are eligible under the CPChem health plan rules as outlined in the Summary Plan Description and the DEV Matrix. After being dropped as a result of the DEV process, you can add **eligible** dependents during Open Enrollment or after a Qualified Status Change (such as an adoption), although the dependent will once again be subject to the DEV process.

Q7. What should I do if I realize that one of my listed dependents is no longer eligible?

A: To indicate on your DEV Checklist which dependents are no longer eligible for coverage, simply mark an "X" in the "Remove From Coverage" box beside that dependent's name to indicate that the dependent should be dropped from coverage.

Q8. If, due to the removal of a non-eligible dependent, my cost of coverage is reduced, will I be refunded premiums already paid?

A: No, any amounts you have already paid will not be refunded.

Q9. I have dependents enrolled in the CPChem Benefit Plans, but they are not listed on my letter. What should I do?

A: Please contact the Chevron Phillips Chemical Benefits Service Center at 1-800-446-1422, (option 1) to determine why that individual was not listed as a covered dependent.

Q10. Can I add an eligible dependent that is not listed on my Checklist?

A: No. You cannot add eligible dependents as part of this verification process. Please contact the Chevron Phillips Chemical Benefits Service Center at 1-800-446-1422, (option 1) for information on how to make changes to your benefit elections.

Q11. The date of birth for one of my dependents on the Checklist is incorrect. What should I do?

A: Please contact the Chevron Phillips Chemical Benefits Service Center at 1-800-446-1422, (option 1) to have your dependent's information corrected. You must also complete your Checklist and submit it along with the supporting proof documentation to the Chevron Phillips Chemical Benefits Service Center Service Center.

Q12. Do I need to provide documentation verifying mental and/or physical disabilities for my dependents?

A: CPChem continues to rely on Aetna's ongoing process for verifying mental and/or physical disabilities for children age 26 or older who are covered under the CPChem Benefit Plans. Therefore, this DEV process is not intended to verify mental and/or physical disabilities.

For the purposes of the DEV process, you are only required to provide documentation in evidence that these dependents are otherwise eligible dependents (i.e. birth certificates, adoption records, etc.). Applicable documents are listed within the DEV Matrix.

Q13. Can I fax my Checklist and accompanying documentation instead of mailing them?

A: Yes. If you wish to fax your submission, you can fax the Checklist and verification documents to the Chevron Phillips Chemical Benefits Service Center at 1-888-775-4064.

This is a secure electronic fax service. Chevron Phillips Chemical Benefits Service Center team members have access to the secure repository that stores your fax. This is unlike your regular fax service. We know that it is important to keep your information private, and we have put the necessary security in place to protect your information from public exposure. Our secure fax service complies with the Health Insurance Portability and Accountability Act (HIPAA).

Make sure you include your Checklist with the copies of your supporting documentation. Once you have sent the fax, carefully check the fax transmittal report to ensure that all your pages were sent successfully to the correct number. Be sure to keep a copy of this transmittal report.

Q14. Can I black out personal information on my documents before submitting it as a verification document?

A: Yes, we recommend you black out any financial data, social security numbers and/or account numbers.

Q15. Will I be reimbursed for any cost of obtaining copies of the required documents I must provide to verify my dependent(s) eligibility for coverage?

A: No, any charge for obtaining copies of required documents is your responsibility.

Q16. How do I know my information will be kept confidential?

A: The Chevron Phillips Chemical Benefits Service Center employees working on this verification process have completed training regarding the Health Insurance Portability and Accountability Act (HIPAA). Chevron Phillips Chemical Benefits Service Center's operations comply with HIPAA privacy guidelines.

The Chevron Phillips Chemical Benefits Service Center adheres to strict confidentiality and data security rules and methods. The Chevron Phillips Chemical Benefits Service Center employees undergo background checks prior to employment.

Any data you provide to Chevron Phillips Chemical Benefits Service Center will only be used to conduct the DEV process.