

updated: january 2022

# key deadlines & tasks for a smooth benefits transition

for legacy REG U.S.-payroll employees

## health and protection benefits

deadline	task
<p><b>Deadline varies.</b> <b>Final deadline within 60 days of the date you enrolled.</b></p>	<p><b>complete the dependent verification process</b></p> <p>If you enrolled dependent(s) in Chevron health coverage, you are required to complete the <b>dependent verification process</b> within <b>60 days of enrolling</b>. <i>Your REG dependent verification will not carry over.</i> Be sure to submit your documentation on the <b>BenefitConnect</b> website well before your deadline to ensure your dependents don't lose their coverage.</p> <p><b>See the enrollment instructions</b> for more information about completing this process. If you've already submitted documentation, it can take approximately a week for your verification to be processed; call the <b>HR Service Center</b> at <b>1-888-825-5247</b> directly if you need a status update regarding your submission.</p>
<p><b>If you haven't already, act now.</b></p>	<p><b>Do you use mail order for your prescriptions?</b></p> <ul style="list-style-type: none"><li>• If you receive medication through your current plan's mail order delivery service, your <b>prescription cannot be transferred</b>, regardless of the Chevron plan you chose. Action is required to transfer your mail-order prescriptions. <b>Get instructions here.</b></li><li>• If your current prescribing provider or retail pharmacy is not part of the <b>network</b> under Chevron plans, <b>review our prescription drug transition tip sheet</b> to determine if action may be needed for your situation.</li></ul>
<p><b>Applications start January 1.</b></p> <p><b>Application deadline for orthodontia is January 31, and March 1 for medical and behavioral health</b></p>	<p><b>Do you need continuation of care for a condition?</b></p> <p><b>Continuation of care</b> (also referred to as <i>transition care</i>) allows you to continue to receive care for certain medical or behavioral health conditions from providers who <i>do not</i> participate in your new plan's network. There is also a process for <b>orthodontia</b> treatment in progress. You might need continuation of care if you are already in active treatment for certain ongoing conditions on January 1, 2023 and your provider is <i>not</i> in your new plan's <b>network</b>. To read more about the requirements and the application process, including required forms, go to <a href="https://hr2.chevron.com/REG">hr2.chevron.com/REG</a>, scroll to the <b>Plan Ahead</b> section, and choose the <b>Continuation of Care</b> tab.</p>
<p><b>Act anytime in 2023 if desired.</b></p>	<p><b>BenefitWallet HSA and other HSA next steps and information</b></p> <p><b>This HSA tip sheet</b> includes instructions and information about the health savings account (HSA) transition including next steps after you enroll, timing of contributions, managing your account, and how to rollover your Optum HSA or other HSA account.</p>

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## health and protection benefits (continued)

deadline	task
January 6 paycheck	<p><b>Chevron benefit deductions begin</b></p> <p>If you enrolled in your Chevron <b>health and protection</b> benefits by December 22, many – but not all – of your Chevron benefit deductions will begin as early as this first paycheck. – but not all – of your Chevron benefit deductions will begin as early as this first paycheck. (It could take up to two pay periods for all deductions to begin, or longer if you enrolled after December 22.) For <b>BenefitWallet HSA</b> contributions, see <a href="#">this HSA tip sheet</a> for additional timing information. If you were enrolled in the REG 401(k) as of December 2, 2022, this is also the first paycheck that contributions to your <b>Chevron ESIP</b> will also begin.</p>
Take action starting January 1	<p><b>Have you already been approved for time off under REG Parental Leave?</b></p> <p>If you have already been approved for time off under REG Parental Leave, you may need to request a <i>new</i> absence for the Chevron Bonding Benefit, beginning January 1, 2023, depending on your leave. Review these <a href="#">Transition Tips</a> for more information; instructions for the <a href="#">Chevron Disability Management</a> process are available here online.</p>
Take action within 30 days	<p><b>Report life events right away</b></p> <p>If you experienced a qualifying life event in mid- or late- <b>December 2022</b> (for example, marriage, birth or adoption of a child, or divorce) that affected your 2022 REG benefits, be sure to contact <a href="mailto:REGBenefits@regi.com">REGBenefits@regi.com</a> prior to your 30 day reporting deadline. You must <b>also</b> contact the <b>Chevron HR Service Center</b> at <b>1-888-825-5247</b> within that 30 day deadline to ensure your 2023 Chevron benefits are also appropriately updated.</p> <p>For any life events that occur on or after January 1, 2023, you have 31 days to report the event and update your Chevron benefit coverage (when allowed) on the <a href="#">BenefitConnect</a> website or by contacting the <b>Chevron HR Service Center</b> at <b>1-888-825-5247</b>.</p>
Starting January 30, 2023	<p><b>Designate beneficiaries for your Chevron benefits</b></p> <p>If you did not already do this during your health and protection enrollment period, be sure to designate beneficiaries on the <a href="#">BenefitConnect</a> website. Your REG beneficiary designations <i>do not</i> transfer to Chevron. At minimum all employees must designate beneficiaries for your Basic Life Insurance, company-provided accident insurance plans, final pay, vacation, pension. You can now also designate for your Chevron ESIP, if enrolled. From the BenefitConnect home screen, click on the button in the blue <b>My Beneficiaries</b> tile near the bottom of the page to get started.</p>
Take action starting January 1	<p><b>Manage portability decisions for certain REG coverage</b></p> <ul style="list-style-type: none"><li>• <b>REG Critical Illness Insurance and/or Accident Insurance</b> with The Standard. When the termination of your coverage is completely processed after December 31, a portability flyer and letter with your options, the process, and contact information will be mailed to you.</li><li>• <b>REG Pet Insurance Plan ends on December 31, 2022.</b> Chevron does not currently offer a voluntary pet insurance plan. You will have the option to continue your coverage on an individual basis and pay for it through direct bill. Nationwide will reach out to you directly when your coverage ends to discuss your options to continue coverage. You can also call Nationwide directly at <b>1-800-540-2016</b> to start the process.</li></ul>

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# 401(k)

deadline	task
<b>Starting January 4, 2023</b>	<b>Access your Chevron ESIP</b> <p>You can now manage your Chevron ESIP account, including changing your contributions and investments. Contribution election changes you make on the Fidelity site will be processed for paychecks <i>after</i> January 6; changes can take up to two pay periods to take effect, depending on the timing of your changes. <b>Note that your REG 401(k) balance will not be available to view and manage until the blackout period ends.</b></p> <ul style="list-style-type: none"><li>• Log on to <a href="http://www.netbenefits.com">www.netbenefits.com</a></li><li>• Call Fidelity through the HR Service Center at <b>1-888-825-5247</b> (option 2, 3, then 2)</li><li>• If you already have a username and password for another Fidelity account, use that same login information. Otherwise, select <b>Register as a new user</b>.</li></ul>
<b>January 6 paycheck</b>	<b>Chevron benefit deductions begin</b> <p>If you were enrolled in the REG 401(k) as of December 2, 2022, this is the first paycheck that contributions to your <b>Chevron ESIP</b> will also begin. In addition, if you enrolled in your Chevron <b>health and protection</b> benefits by December 22, many – but not all – of your Chevron benefit deductions will also begin as early as this first paycheck. (It could take up to two pay periods for all deductions to begin, or longer if you enrolled after December 22.) For <b>BenefitWallet HSA</b> contributions, see <a href="#">this HSA tip sheet</a> for additional timing information.</p>
<b>Week of January 22, 2023</b>	<b>Blackout period ends</b> <p>During the week of January 22, 2023, you will be notified once your transferred REG 401(k) Plan balance is available. You can access your Fidelity account online or call them directly to view and manage your transferred REG 401(k) Plan balance, including changing your asset allocations.</p> <ul style="list-style-type: none"><li>• Log on to <a href="http://www.netbenefits.com">www.netbenefits.com</a></li><li>• Call Fidelity through the HR Service Center at <b>1-888-825-5247</b> (option 2, 3, then 2)</li></ul> <p>If you already have a username and password for another Fidelity account, use that same login information. Otherwise, select <b>Register as a new user</b>.</p>
<b>Starting January 30, 2023</b>	<b>Designate beneficiaries for your Chevron ESIP</b> <p>Designate beneficiaries for your Chevron ESIP on the <a href="#">BenefitConnect</a> website. Your REG 401(k) beneficiary designations do not transfer to Chevron. From the BenefitConnect home screen, click on the button in the blue <b>My Beneficiaries</b> tile near the bottom of the page to get started.</p>
<b>February 2023</b>	<b>401(k) loan(s) transition to the Chevron ESIP</b> <p>Any outstanding loans in the REG 401(k) Plan will automatically transfer to the Chevron Employee Savings Investment Plan (ESIP). You will continue to repay your loan(s) in the Chevron ESIP in the same manner as you have in the REG 401(k) Plan.</p> <p>Outstanding loan payments to the Chevron ESIP will not be deducted from your pay until early February 2023. As a result, any existing loans will be recalculated as part of the transition and your loan payment amount will change. Otherwise, the transition will not affect the terms or length of your loan(s).</p>