



Leased Employee Service Application

What is this form?

If you have prior contractor/leased employee service with Chevron, you may be eligible to receive additional service credit for some of your benefits like retirement or vacation. This credit is **not** automatic; you must submit an application form to request a review of your situation before a determination can be made.

Please return this form within 60 days from your date of hire, if you believe this situation applies to you. The information you provide on this application will help Service Administration determine if your contractor service meets the criteria to receive Vesting and Eligibility Service and Health and Welfare Eligibility Service credit under certain Chevron retirement plans and benefit plans or policies. Service Administration will notify you of the results via U.S. mail. Note that the online retirement estimator on BenefitConnect will not yield a correct estimate until the service adjustment letter is sent to you.

Do I need to complete this application?

- **COMPLETE THIS APPLICATION (F08)** if you have prior **leased employee** service, which means you are an employee and you previously performed services as a contractor or leased employee for Chevron Corporation or one of its acquired companies (including Gulf, Texaco, and Unocal) or affiliates (future references will be noted as "Chevron").
- **DO NOT COMPLETE THIS APPLICATION** if you have prior **employment** with Chevron Corporation, a Chevron Corporation acquired company, and/or a Chevron Corporation affiliated company. **DO COMPLETE** the Prior Service History Form (F36), to report your prior employment history. This form is available on the **Forms** page on **hr2.chevron.com**.
- **COMPLETE BOTH APPLICATIONS Forms (F36) and (F08)** if you have *both* prior **leased employee** service and prior **employment**.

It's important to understand that completing this application does not guarantee you will receive service credit. Prior contractor service must meet eligibility requirements and is subject to the rules of the applicable plan or policy. Service credit will not be issued toward dates in which you worked in a subcontractor capacity. Examples of subcontractor and other non-qualifying situations are included in the Definitions section on this application. We know this service review is important to you, and we'll work as quickly as possible to complete your request. Chevron's hiring volume is high, so we prioritize our workload accordingly. Thank you in advance for your patience.

If you have any questions

Please call the HR Service Center at 1-888-825-5247 (1-832-854-5800 outside the U.S.). Choose the option for **Leased Employee and Prior Service Applications** from the **Update Personal Data** call menu.

APPLICATION INSTRUCTIONS

1. **Review the *Definitions* section** on this form including the examples of qualifying and non-qualifying situations.
2. **Complete a separate Application Questionnaire** for each period that you believe may qualify as Leased Employee Service, as described on the application.
3. **Ask the verifier** to complete the Verifier section of this application.
4. **Make a copy** of your completed application to keep for your files. **Return** this completed application via one of the following:
 - **Email** to the Human Resources (HR) Service Center using the Message Center on BenefitConnect.
 - **Mail** to the Chevron Human Resources Service Center | DEPT: CVXP | PO Box 981909 | El Paso, TX 79998.

It is up to you, the employee, to ensure that the completed application is returned. Service Administration will not acknowledge incomplete applications or applications lacking a verification.

Allow 90 days for your application to be processed. If, after 90 days, you have not received a response to your request, call the HR Service Center. Note that a representative of the Benefits Department may call you, the verifier, or both.

Definitions

Leased Employee - In general, service is credited to a plan participant for periods during which the individual performed services as a leased employee within the meaning of Internal Revenue Code Section 414(n), to the extent the applicable plan or policy recognizes such service. For this purpose, a *leased employee* is an individual who meets *all* of the following requirements:

- Performed services for Chevron pursuant to a contract between Chevron and another person or organization.
- Was not an employee of Chevron at the time the services were performed.
- Performed the services under the primary direction and control of Chevron.

For purposes of this form, the period(s) during which services were performed for Chevron as a leased employee as defined above is referred to as *Leased Employee Service*.

Qualifying Situations - Chevron has a need for personal services and contracts with another organization to bring in people to carry out these tasks. For example, Chevron often uses the services of staffing agencies. These agencies primarily exist to match individuals to select job opportunities and handle the administrative portions of a job such as timekeeping and managing payroll. People who work in this capacity are directly and *primarily or exclusively* supervised by Chevron managers or supervisors, use only Chevron equipment, and work only in Chevron offices, or on Chevron premises.

Non-Qualifying Situations - Chevron contracts with a company because that company was successful in a bidding process to provide a service in its entirety. The bidding process may have taken place many years ago. That company employs, or contracts with individuals in connection with that service or project. An example of this situation might be a company contracted to build a building, work on plumbing or electrical issues, operate a call center, or maintain phone services. Under these contracts the contracted company has staff on the premises directing other individuals of that company on day to day work. The contracted company does the majority of the supervising of its own employees or contract employees that it has hired. The contracted company possibly uses some of its own equipment, and employees generally complete tasks with little work direction from Chevron employees. While not absolutely all work direction is given by a contracted company representative, the majority is. Persons who work in this capacity report to Chevron as an extension of their job with the contracted company.

Leased Employee Service Application Questionnaire

| EMPLOYEE: Please complete the following information. | |
|------------------------------------------------------|-------------------------------------------------------------------|
| Your Name: | |
| Application Questionnaire Date: | |
| Are you a hire or rehire: | <input type="checkbox"/> New Hire <input type="checkbox"/> Rehire |
| Hire or Rehire Date: | |
| Current Work Location: | |
| Phone Number(s): | |

Please direct all questions to the HR Service Center.

Once we have received your completed application, a representative of the Benefits Department may call you, or the verifier or both to request more information. A representative of the Benefits Department will determine if you are eligible for Chevron service credit and a response will be sent via U.S. mail within 90 days after receipt of this document.

1. A separate Leased Employee Service Application Questionnaire must be completed for each period of service credit you wish to be considered for qualifying Leased Employee Service.
 - a. How many separate application forms do you intend to submit (i.e. how many separate periods of credit you are seeking) ?
Please submit **all** applications together to avoid your application being rejected. _____
 - b. Enter the period of time (month and year) that you performed services for Chevron to which this Application Questionnaire relates: _____ to _____
2. What is the name of the agency for which you worked?
3. Please provide contact information for this agency, as applicable.
 - a. Name
 - b. Phone
 - c. E-mail
 - d. Address
4. What was your job title?
5. Was all of your work for Chevron completed in a Chevron office, or on Chevron premises? Yes No
6. Did you perform work for companies *other than Chevron* throughout the duration of the assignment? Yes No

7. Was the work performed production work, or did you utilize specialized skills (including crafts and/or trades) while performing this assignment? Examples include electrician, plumber, and engineer or other work where typically formal education is required rather than on-the-job training.

a. Production work? Yes No

b. Specialized skill? Yes No

c. Describe the nature of your specialized skill.

d. If your specialized skill required a license or certification(s), list the certification(s) here.

8. Did you use any of the *agency's* equipment?

Yes, I used the following equipment/tools:

No, I did not use agency equipment/tools.

9. Did the agency own its own cars or trucks? (check the one that applies)

Yes, agency owned vehicles, but I **DID NOT** drive an agency vehicle.

Yes, agency owned vehicles, and I **DID** drive an agency vehicle.

No, the agency did not own its own vehicles.

10. Did the agency employ individuals — such as Foreman, Journeyman, Supervisors or Team Leaders — who were also onsite at the Chevron premises providing onsite guidance?

Note: This does not include a person who performed solely administrative activities such as timekeeping and payroll.

Yes

No

11. Tell us how you were recruited to the assignment. (Check the one that applies)

Before taking this assignment, you met with or interviewed with a Chevron Manager or Supervisor who subsequently determined you were a correct fit for the position.

Before taking this assignment, you met with or interviewed with a person at your agency only who subsequently determined you would be working for Chevron on “the Chevron contract.”

12. Did you perform work for Chevron during this period of time on a substantially full-time basis? A substantially full-time basis means either one of the following applies:

- You worked at least 1500 hours in a 12-month period.
- You worked at least 75 percent of the average number of hours of a Chevron employee in the same position.

Yes, I was substantially full-time.

No, I was not substantially full-time.

13. Who determined the best way to achieve the results of the request made by Chevron? (Check the one that applies)

It was left up to me, or the agency, or both me and the agency to determine how to achieve the results.

Chevron determined how the results would be achieved.

14. Were you required to travel during your employment?

Yes

No

a. If you were required to travel, who paid for the travel expenses?

Chevron

Agency

- | | | |
|-----------------------------------------------------------|------------------------------------------------|-----------------------------------------------------|
| 15. Who approved your vacation requests? | <input type="checkbox"/> Agency Representative | <input type="checkbox"/> Chevron Manager/Supervisor |
| 16. Whom did you call when you were going to be out sick? | <input type="checkbox"/> Agency Representative | <input type="checkbox"/> Chevron Manager/Supervisor |
| 17. Who was the final approver for overtime? | <input type="checkbox"/> Agency Representative | <input type="checkbox"/> Chevron Manager/Supervisor |

FOR COMPLETION BY EMPLOYEE

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| Initial Here |
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By initialing and returning this form as instructed above,

I, *(enter name)* _____

am confirming that the verifier named below is either a prior manager/supervisor or, if a prior manager/supervisor is not available, is a person who I feel is qualified to assess my work situation and substantiate my answers. This person is a professional acquaintance and not a personal friend. I acknowledge that having a personal friend approve this form would constitute a conflict of interest and would not be valid. I have read and understand the *Definitions* section above and do not have reason to believe that the service reported on this form is not qualifying Leased Employee Service, and I have answered the questions to the best of my ability. By doing so, I am helping the Service Administration group assess any service adjustments I may be entitled to in accordance with the law and Chevron policy. I acknowledge that the terms of Chevron's plans and policies determine whether Leased Employee Service counts towards the different types of service recognized under the plans and policies. I also acknowledge that random service credit audits may be performed and erroneous information discovered, or willfully withholding information, will result in punishment up to and including dismissal of employment.

| | |
|----------------------------------------------------------------------------------------------|--------------|
| Please provide the name and phone number of the Verifier for this Application Questionnaire. | |
| Name | Phone Number |

FOR COMPLETION BY VERIFIER OF EMPLOYMENT
(example: previous manager of employee's previous employment)

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|--------------|
| Initial Here |
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By initialing this form, I, *(enter name)* _____

acknowledge that either I managed or supervised the person named above (or if manager/supervisor no longer available to respond, that either I worked directly with this person or am professionally acquainted with this person), that I have knowledge regarding the service described above, and that I have reviewed and agree with the answers given by the employee.

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| FOR BENEFITS USE ONLY | |
| Action Required: | Approved By: |