

# New Tax Form 1095 Delivery Delayed to February

## Your Health.

For U.S.-payroll employees eligible for Chevron health coverage.

As communicated last December, a new tax form, **Form 1095**, will be provided to you for the first time this year. Form 1095 is required to report information about offers of health coverage and enrollment in health coverage for federal tax purposes. Depending on the source of your health care coverage during 2015, you may receive a Form 1095-B, a Form 1095-C, or even both. You generally will not need to file it with your Federal income tax return but you should keep your Form 1095 with your other income tax documents.

### Form 1095 is Coming in February

These forms are typically to be distributed by January 31 of each year, just like a Form W-2. However the Internal Revenue Service (IRS) recently extended the deadline for employers and health care providers to deliver the 2015 Form 1095s to plan participants until March 31, 2016. **As a result of this extension, Chevron will delay the mailing of Form 1095 to February 29, 2016.** (Note: The Form 1095 you may also receive directly from a health care provider or other employer may also mail on a different date.) If you're eligible for Chevron health coverage, Form 1095 will be mailed to you automatically; you don't have to do anything. And if you suspended mail delivery and consented to receive your Form 1095 electronically, the HR Service Center will issue email notifications in February when your Form is available online. This notification will come from the mailbox with the email address **DoNotReply-1095 @xerox.com**.

- [Learn more about Form 1095](#)

### The Deadline to File Your U.S. Taxes Has Not Changed

**The 2015 tax filing deadline for individual taxpayers has not changed due to the extended mailing window.** The IRS has issued [guidance](#) that you do not have to wait for either Form 1095-B or 1095-C to file your individual income tax return. You can use other forms of documentation, in lieu of the Form 1095 information, to prepare your tax return. Other forms of documentation that would provide proof of your medical coverage include:

- Your **medical ID card**.
- **Explanation of Benefits (EOB)** from your medical plan.

- **Chevron pay statements** reflecting medical plan deductions. You can view and print your 2015 pay statements online. Your pay statement shows the monthly deduction taken for Chevron medical coverage as well as the year-to-date total for medical coverage. Go to the [U.S. HR website](#) on the Chevron intranet, choose the **My Personal Information (My HR)** link on the right side of the page, then **Pay Statement**. *Note that medical contributions are taken in advance, so to see your 2015 medical year-to-date total, go to the pay statement from the next-to-last pay period in 2015 (not the last pay period).*
- **Your 2015 form W-2** shows the value of your Chevron medical coverage. You can also access your W-2 online. Go to the [U.S. HR website](#) on the Chevron intranet, choose the **My Personal Information (My HR)** link on the right side of the page, then **W-2/W-2c Retrieval**.
- **Other statements** indicating that you, or a member of your family, had health care coverage.

You do not need to send the IRS proof of your medical coverage. However, you should keep any documentation with your other tax records. This includes records of your family's Chevron (or other employer-provided) coverage, premiums paid, and type of coverage. You are encouraged to consult a tax professional if you have questions about your 2015 U.S. tax return.

### There's Still Time to Sign-up for Electronic Delivery.

If you'll be receiving a Form 1095 from Chevron, you can choose to suspend mail delivery and consent to receive it electronically through the **Benefits Connection** website.\*

- If you want to use this service, you must register for electronic delivery. The deadline to register has been extended to **January 31, 2016**.
- You will be notified by email from **DoNotReply-1095 @xerox.com** to view your form as soon as it's available in February 2016.
- Your Chevron Form 1095 is automatically stored online for historical reference or reprint.

*Electronic delivery and the ability to view historical documents online applies only to the Form 1095 provided through Chevron; it doesn't apply to a Form 1095 provided directly from an insurance carrier, another employer, or through Medicare.*

### Electronic Delivery Sign-up Period\* Take Action by January 31, 2016

1. Login to [Benefits Connection](#).
2. Choose the **Health and Welfare** tab on the top navigation.
3. Choose **View Tax Form 1095** from the left navigation under the **I Want To** box.
4. Follow the instructions on the screen to **Go Paperless**.

You can start or stop electronic delivery at any time, but the election you make during the time period above will apply to your Form 1095 for 2015 through Chevron. You can also provide an alternate mailing or email address for your Form 1095 by following the directions above. **Please note the alternate mailing or email address you provide applies only to your Form 1095.** Your email and permanent mailing address on file with the HR Service Center will not be affected and alternate addresses will not apply to other Chevron benefit or tax mailings and emails.

### **\*Important: Special Exceptions to Electronic Delivery**

- **Expatriate Employees:** The electronic delivery option may not be available for Form 1095s that reflect health coverage for periods of time in 2015 when you were a U.S.–payroll expatriate on a residential assignment.
- **If You Are Not Eligible for Health Benefits:** If you were not eligible for Chevron health benefits, you will not receive a Form 1095 from Chevron, electronically or otherwise.
- **Medicare-Eligible Participants:** If Medicare was the primary coverage for you or any of your covered dependents who were eligible for Medicare, you will not receive a Form 1095 from Chevron. Medicare is responsible for reporting your Medicare coverage to the IRS. Electronic delivery and the ability to view historical documents online as described in this document pertains only to the forms provided by Chevron.

### **Have Questions?**

If you have questions about Form 1095 or any of your Chevron benefits, call the Chevron Human Resources Service Center:

- 1-888-825-5247 (inside the U.S.)
- 610-669-8595 (outside the U.S.)
- 6 a.m. to 5 p.m. Pacific time (8 a.m. to 7 p.m. Central time)
- Monday through Friday (except on holidays).