



chevron HR transition

# transition to-do list

for legacy PDCE U.S.-payroll employees

## **NEW** Information as of September 18, 2024

This to-do list highlights key information, actions, and deadlines to help you prepare for a smooth transition to Chevron benefits and pay. It will be updated *regularly* throughout the transition as additional milestones approach, so check back often.



Remember, your current PDCE pay and benefits will continue without interruption until you become eligible to participate in Chevron pay and benefits, which is expected to begin on **January 1, 2025**. You should continue to use your existing PDCE resources, contacts, and systems to manage your 2024 pay and benefits until you are notified otherwise.



### dates & deadlines

Important upcoming dates and deadlines that may require your action. These are the dates and deadlines known at this time. More will be added throughout the transition period.

[view the checklist >](#)



### maintain regularly

You should *regularly* monitor and/or complete these tasks (as applicable) during the transition period. Staying on top of these items will facilitate a smooth transition to Chevron pay and benefits.

[view the checklist >](#)



### thinking ahead

These items are provided for your awareness as you're planning for health needs this year. No immediate action is required right now. In September you'll receive more instructions and detailed information that may require your action at that time, depending on your situation.

[view the checklist >](#)



## dates & deadlines

### october 2024

#### Remember, your pay schedule is changing!

The timing of your paychecks in January 2025 will adjust to accommodate the initial shift from PDCE to Chevron pay dates. If you haven't already, be sure to review the pay schedule transition guide to understand what to expect and plan ahead. This guide also explains important detail about benefit deductions, including 401(k), and check dates during this transition. [Guide for Hourly O&M employees](#) | [Guide for Exempt and Salaried Non-Exempt employees](#)

#### **October 31, 2024** Deadline to request 2024 PTO sell-back

If you are a **field operations employee** and eligible for PTO sell-back, you may do this when you have accrued in excess of 80 hours. The deadline to request PTO sell-back, if desired, is October 31, 2024. To request sell-back, you must *first get supervisor approval*, then **send an email to [PDCPayroll@chevron.com](mailto:PDCPayroll@chevron.com)**. If you choose this option, the payout for your excess hours will be paid within one to two pay cycles. Note that you will still receive the **final payout** of all accrued and unused PDC Energy PTO hours as of year-end, whether or not you use the sell-back policy. Refer to [PDC Energy Policy 307](#) or send an email to [PDCPayroll@chevron.com](mailto:PDCPayroll@chevron.com) for more information about PTO sell-back.

### november 2024

#### Taking time off during the holiday season?

It's important that you continue to timely use and record your PTO and, when possible, request future PTO that will occur between now and December 31 **in the ADP system** as soon as you know about it.

#### **November 15, 2024** System features locked in ADP: Work Data

As we prepare to leave ADP, certain features of the system will be closed and locked. When a system feature is locked, you cannot change or update that information until the transition is complete on January 1, 2025. [Access the ADP system](#) and verify your information is accurate ahead of this *first* system transition milestone:

- Your **name** and **work data** – like location, schedule and phone number. Talk to your supervisor for work location or schedule corrections, if necessary.
- Other remaining system features continue to be available after this date.

### december 2024

#### **December 9 – December 20, 2024** Enrollment for 2025 Chevron benefits

**Action required.** This is your opportunity to enroll in Chevron's health, protection and work & life benefits for 2025. Make elections from work, home, or anywhere with internet or phone access. Enrollment instructions will be provided in November.

## december 2024 (continued)

### **December 9, 2024** **Prepare documents for dependent verification**

If you enroll dependent(s) in Chevron health coverage, you are *required* to complete the Chevron dependent verification process within 60 days of your enrollment election. **If you don't complete this requirement, your dependent(s) will be disenrolled from Chevron coverage.** You are strongly encouraged to prepare ahead to ensure you have the required proof documents. You can upload your documentation in the benefits enrollment system – BenefitConnect – starting December 9 (you *cannot* access this system before that date). While you are not required to upload documentation at the same time you make enrollment elections, you *must* still return to the enrollment system **within 60 days** to upload your documents. [Learn about Chevron's Dependent Verification Process >](#)

### **December 20, 2024**

#### **More system features locked in ADP: Personal data, tax and direct deposit**

As we prepare to leave ADP, certain features of the system will be closed and locked. When a system feature is locked, you cannot change or update that information until the transition is complete on January 1, 2025. [Access the ADP system](#) and verify your information is accurate ahead of this *second* system transition milestone:

- Your **personal information**, such as home address, phone, and emergency contacts.
- **Verify your federal withholding election(s).** Chevron's system will not accept federal tax withholding elections older than 2020, so it's important to [verify your withholding information](#) in ADP to register a recent effective date. (Note: State withholding elections will *not* automatically transfer to Chevron's system. You'll receive instructions in early January 2025 to update your state withholding elections, if applicable.)
- **Verify your payroll direct deposit preferences.** Chevron systems can only accommodate *up to 3 accounts* for direct deposit purposes.

#### **Submit your wellness reimbursement and professional development stipend receipts**

December 20 is the *final* deadline to submit your receipts, but you are *strongly* encouraged to submit them on a regular basis through [Rocky Mountain Reserve](#).

- You will continue to receive a **PDCE monthly wellness benefit** until you become eligible to participate in Chevron's benefit plans on January 1, 2025.
- The **PDCE professional development stipend** remains available during 2024; you will have access to Chevron's learning and development resources and policies starting in 2025.

#### **Last day to change your Fidelity health spending account (HSA) payroll deduction**

If enrolled, your payroll contributions to the Fidelity HSA will continue through 2024. The last 2024 contribution to your Fidelity HSA will be taken from your December 27 paycheck. You can continue to stop, start or change your employee HSA contribution at any time during the year [in the ADP system](#). If you are trying to maximize your savings in 2024, December 20 is the last day to change your Fidelity HSA payroll contribution. You'll receive more information in September about the transition of your Fidelity HSA to the HSA offered through Chevron payroll deductions.

#### **Deadline to change your 401(k) payroll deduction for December 27 paycheck**

If you need to change your elected contribution percentage for the PDC Energy 401(k) to be effective with your December 27 paycheck, you must do so through [Fidelity](#) by **December 20** at 2 p.m. Mountain time. These deductions will apply to your 2024 plan year IRS limits.

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## december 2024 (continued)

### December 31, 2024

#### Spend your PDCE flexible spending account(s) funds

The PDCE **dependent and health** flexible spending accounts (FSAs) will *end* on **December 31, 2024**. For this reason, rollover of your remaining health FSA account balance is not possible in 2025, whether through your PDCE FSA or the Chevron health FSA. Be sure to monitor your dependent and health FSA balance(s) and plan your eligible expenses to ensure you do not lose any of the dollars you have contributed (or will contribute) in 2024. You have until **March 31, 2025**, to request reimbursement from [Rocky Mountain Reserve](#) for expenses incurred in 2024, but you are *strongly* encouraged to submit any claims for reimbursement as soon as possible during the transition.

#### Final date to record 2024 PTO

As we prepare to leave ADP, certain features of the system will be closed and locked. When a system feature is locked, you cannot change or update that information until the transition is complete on January 1, 2025. [Access the ADP system](#) and verify your information is accurate ahead of this *third* system transition milestone:

- **As previously announced**, all accrued and unused PDC Energy PTO hours as of year-end 2024 will be paid out in a separate check on January 10, 2025. It's important that you continue to timely use and record your PTO and, when possible, request future PTO that will occur between now and December 31 in the ADP system *as soon as you know about it*.
- **December 31, 2024** is the final deadline to record PTO used in 2024 in ADP.
- **After this date, ADP will be locked for any further PTO recording.**

## january 2025

### Remember, your pay schedule is changing this month!

The timing of your paychecks in January 2025 will adjust to accommodate the initial shift from PDCE to Chevron pay dates. If you haven't already, be sure to review the pay schedule transition guide to understand what to expect and plan ahead. This guide also explains important detail about benefit deductions, including 401(k), and check dates during this transition. [Guide for Hourly O&M employees](#) | [Guide for Exempt and Salaried Non-Exempt employees](#)

#### **January 6, 2025 by 10 a.m. MT** Final date to finalize December 2024 time card

You have until January 6 at 10 a.m. MT to finalize your [ADP timecard](#) for the pay period of **December 21 – December 31, 2024**. After this date, ADP will be locked to you for any further updates or changes.

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## maintain regularly



### Continue to follow existing process in case of an injury, illness or disability

Your current PDCE benefits for a *non-work-related* illness, injury or disability will continue uninterrupted until you become eligible to participate in Chevron benefits on January 1, 2025. For now, you should continue to follow existing procedures and requirements in the event of a *non-work-related* illness, injury or disability. Learn more about the transition of these benefits and processes on [hr2.chevron.com/PDCEnergy](https://hr2.chevron.com/PDCEnergy). (Note that work-related injuries are now following Chevron's Worker's Comp processes.)



### Report life events *right away*

Continue to use your existing PDCE resources and contacts to update personal details and make changes to benefits coverage within **30 days** of a qualifying life event (for example, marriage, birth or adoption of a child, or divorce). You are strongly encouraged to report events and make any updates *as soon as they occur* to ensure a smooth transition to Chevron benefits. Until further notice, continue to report events and make updates **in the ADP system** or by contacting **Joni Hjelle**.



## thinking ahead (but no immediate action required ... yet)

- Need to schedule inpatient or outpatient medical care or procedures?**

If you need to schedule inpatient or outpatient medical care near year-end (for example surgery or other hospitalization, laboratory or diagnostic imaging, chemo or radiation, etc.), try to schedule this care for December or for mid-January, if you can. Your existing PDCE benefits will continue through December 31, and while your Chevron health benefits are effective January 1, 2025 (if you enroll), scheduling care for mid-month will allow ample time for the carriers to process your enrollment and issue ID cards well in advance of your appointment. In late September you'll receive more instructions and detailed information about what to expect with the transition of your coverage and additional steps you may need to take for upcoming health care needs during the year-end transition period.
- Keep an eye on your prescription drugs**

You'll need to transfer your prescriptions to your new Chevron health plan coverage in January 2025, particularly if you use mail order, take medication ongoing, or have refills remaining on an active prescription. Depending on your situation, you may need to contact your prescribing physician to facilitate this transfer. There's no action required yet but watch for detailed instructions in late September to learn about what you need to do to plan ahead as the end of the year approaches.