tax forms

where to find them and who to contact

While **BenefitConnect** is your first stop to manage your Chevron benefits coverage, you may need to contact other resources to access certain tax forms related to that coverage. Here's a list of the most common types of tax forms and where to find them. If you don't see your form listed here and still need help, contact the **Chevron HR Service Center** at **1-888-825-5247 (1-832-854-5800 outside U.S.).**

Tax forms are generally issued by **January 31** of each year. Please wait until **February 10** to troubleshoot the receipt of your form, including requesting a reprint if necessary.

where to find common tax documents

Document description	Where to go, who to contact: Active Employee	Where to go, who to contact: Former Employee, Retiree, Survivors
Form W-2		
• Wage and tax statement for *active* employees.	**Chevron Pay System**	----
• For the Retirement Restoration Plan and imputed income on retiree benefits.	----	**Chevron HR Service Center** (choose the *pension* option)
• For stock program(s)	**Chevron HR Service Center** (choose the *pension* option)	**Chevron HR Service Center** (choose the *pension* option)
1095 **Form 1095** reports offers of health coverage and enrollment in health coverage for federal tax purposes.		
• **1095-C** For any active employee eligible to enroll in *any* Chevron U.S. medical coverage option on *any* day in the *prior* tax year. (Even if you chose not to enroll, are now on COBRA, or are now a retiree.)	From the **BenefitConnect** website, choose the **View Tax Form 1095** link to access forms on the HealthEfX portal. You can also call the **Chevron HR Service Center** for assistance with a reprint.	From the **BenefitConnect** website, choose the **View Tax Form 1095** link to access forms on the HealthEfX portal. You can also call the **Chevron HR Service Center** for assistance with a reprint.
• **1095-A** For an individual health plan in the post-65 private retiree health exchange managed by Via Benefits for Chevron.	----	**Via Benefits website** or contact ViaBenefits directly at 1-844-266-1392 (1-801-994-9805 outside U.S.)
• **1095-B** For COBRA or a retiree medical participants enrolled for the *entire* tax year in either the Chevron Medical PPO, High Deductible Health Plan, or High Deductible Health Plan Basic	----	You will receive the form *directly* from your medical plan carrier/claims administrator. Contact your **medical plan** directly for assistance.
• **1095-B** Participants enrolled in the Chevron Medical HMO, or Global Choice Plan for even just one day of the prior tax year.	You will receive the form *directly* from your medical plan carrier/claims administrator. Contact your **medical plan** directly for assistance.	You will receive the form *directly* from your medical plan carrier/claims administrator. Contact your **medical plan** directly for assistance.
• If **Medicare** was your primary coverage, you will not receive a Form 1095 from Chevron. Medicare is responsible for reporting your Medicare coverage to the IRS.	**Contact Medicare** directly for assistance.	**Contact Medicare** directly for assistance.

Document description	Where to go, who to contact	
	Active Employee	Former Employee, Retiree, Survivors
1099-R To report the distribution of the Chevron Retirement Plan and other qualified pension plans, including an annuity.	----	**Chevron HR Service Center** (choose the *pension* option)
1099-SA You'll receive this form if you received distributions over the course of a tax year from the HSA (health savings account) custodian for Chevron. **You will receive up to three *separate* forms from three different custodians due to the transition to the new Fidelity HSA in 2024.** **5498-SA** To report how much money is contributed over the course of a tax year to the HSA (health savings account) custodian for Chevron. **You will receive up to three *separate* forms from three different custodians due to the transition to the new Fidelity HSA in 2024.**	▪ **BenefitWallet 1-855-234-7722** ▪ **HealthEquity 1-877-750-1445** ▪ **Fidelity NetBenefits** website **or contact Fidelity** directly.	
1042-S To report amounts paid to non-U.S. persons from a U.S. source that are subject to withholding.	**Chevron HR Service Center** (choose the *pension* option)	----
1099-HC Massachusetts state tax document required to report information about offers of health coverage and enrollment in health coverage for the previous year.	You will receive the form *directly* from your medical plan carrier/claims administrator. Contact your **medical plan** directly for assistance.	