



your life

# adoption reimbursement program

human energy. yours.™

Adopting a child can be rewarding — for you and your adopted child. But, rewards often come with challenges, and sometimes it can be quite challenging getting through the adoption process. That's where Chevron can help. Chevron pays for many of your adoption expenses through the adoption reimbursement program. In addition, you may be eligible for up to two weeks of paid time off under the [Bonding Benefit](#), and you can take up to six months [unpaid Family Leave](#) so you can to welcome your new child into your home.

## eligibility

You're eligible for adoption reimbursement if you have six months of service and you are:

- A full-time employee or a part-time employee working one of the approved part-time schedules.
- Working for Chevron when you incur the adoption expenses and when the child is placed in your home.

If both you and your spouse/domestic partner are Chevron employees, only one of you can be reimbursed for an adoption.

## how adoption reimbursement works

You can be reimbursed up to \$5,000 for eligible adoption expenses. The adopted child must be under 18, unless he or she is mentally or physically unable to care for himself or herself. The child may be biologically related to you or your spouse/domestic partner, but you can't be reimbursed for expenses relating to guardianship or custody of your own child.

### Expenses Eligible for Reimbursement

- Private and public adoption agency and placement fees.
- Legal fees, court costs and birth certificate fees.
- The child's medical expenses unless they are covered by another source.
- Temporary foster care expenses before the child is placed.
- Fees related to immigration, immunization and translating documents prepared in other languages.
- Travel expenses related to the adoption, including transportation, meals and lodging for you and the child.
- Costs associated with a state-required home study.

### Expenses Not Eligible for Reimbursement

- Voluntary donations such as a contribution to an adoption agency.
- Charges covered under your medical plan or your spouse's or registered domestic partner's medical plan.
- Expenses already reimbursed under your spouse's or domestic partner's adoption plan.
- Guardianship or custody costs that are not associated with the legal adoption of the child.
- Expenses incurred by the birth mother or costs related to a surrogate mother.
- Expenses for services not yet performed or for a child not yet placed in your home.
- Charges that are in violation of federal or state law.

## how to get reimbursed

You can file a request for reimbursement only once for each child — after the child is placed in your home or, for an international adoption, after the adoption is finalized either in the country of origin or the United States. You'll need to print and complete the **Adoption Reimbursement Request** form included at the end of this document. If you adopt more than one child, you should complete a separate form for each.

To file your form, attach copies of all adoption-related receipts that show expenses you've paid, as well as agency documentation or court orders relating to the adoption. If you submit an adoption decree from another country, it must be fully translated into English and submitted in U.S. dollars. Sign and e-mail the completed form to:

Chevron Adoption Reimbursement  
Sara Kashima  
[SKSH@chevron.com](mailto:SKSH@chevron.com)

Global Health and Medical will review your claim and, if everything is in order, will approve your reimbursement and arrange for Chevron to include your reimbursement in your regular pay. This process takes about six weeks from the date you submit the form.

## important tax information

You may be able to exclude the reimbursed adoption expenses from your federal taxable income. If this is the case, federal income tax will not be withheld from your reimbursement. This means that you may not have enough withholding, which could subject you to penalty taxes. In this case, you may want to request additional federal withholding from your pay. Your reimbursement is also subject to Social Security withholding and state taxes, where appropriate.

You may be eligible for a federal tax credit of up to \$10,000 for adoption expenses that are not reimbursed by the company's program. Before you request reimbursement of adoption expenses from Chevron, you should consult a tax advisor just in case it may be more advantageous to take the tax credit than to be reimbursed.

## benefits enrollment for your adopted child

With all the excitement of adding a new child to your family, don't forget important details such as medical coverage. **You have 31 days from the date you adopt the child, or the child is placed with you, to change your benefits coverage.** If you miss this deadline, your child will not be covered and you must wait until the next open enrollment period to enroll your child. Elections made during open enrollment don't take effect until January 1 following open enrollment. Here are some changes to consider making:

- Enroll your child in [health coverage](#).
- Cover your child in the [Dependent Life Insurance Plan](#).
- Increase your spouse's or domestic partner's coverage in the [Dependent Life Insurance Plan](#) if this is the first time you are eligible to enroll a child.
- Enroll or increase your coverage amount in the [Supplemental Life Insurance Plan](#).
- Change your [withholding allowances](#).
- Use your [Bonding Benefit](#) or take [unpaid Family Leave](#).
- Review your beneficiary designations for all benefits on [Benefits Connection](#).
- Sign up for the [Dependent Day Care Spending Account](#) to set aside pre-tax dollars to pay for child care.

[Chevron's Employee Assistance and WorkLife Services](#) can assist you with the emotional ups and downs of the adoption process and help you adjust to a new child in your family. Call CTN 842-3333 or 1-800-860-8205 day or night.

## Adoption Reimbursement Request

Employee Information		Eligible Adoption Expenses	
Employee Name		Date Paid	Amount Description
Personnel Number (PERNR)			
Service Date: Month-Day-Year			
Operating Company			
Work Location			
Home Address: No. and Street		Total Reimbursement Requested: _____	
City		<ul style="list-style-type: none"> <li>Please attach copies of receipts in U.S. Dollars for expenses listed above, as well as written evidence of placement.</li> <li>Qualified reimbursements under the Internal Revenue Code are not subject to federal income tax withholding. They are subject to FICA/FUTA withholding and possibly state/local withholding.</li> </ul>	
State Zip Code			
Home Telephone		<b>Employee Request for Reimbursement</b> I am adopting a (check all that apply): <input type="checkbox"/> Child under age 18 <input type="checkbox"/> Stepchild <input type="checkbox"/> Foster child <input type="checkbox"/> Relative <input type="checkbox"/> Child from overseas <input type="checkbox"/> Biological child	
Work Telephone			
Cell			
Fax		I would like to apply for reimbursement of the adoption expenses listed above, confirming that _____, whose birth date is _____, was placed in my home for the purpose of adoption on _____. If finalized, the date of adoption finalization was _____ (required for international adoptions).	
Email		I certify that this is a claim for allowable expenses under Chevron's Adoption Reimbursement Program. I also certify that I am not requesting a separate adoption reimbursement for the same child from another employer's adoption reimbursement program.	
Does your spouse/domestic partner work for Chevron? <input type="checkbox"/> Yes <input type="checkbox"/> No			
If yes, PERNR		_____ Signature of Employee Date	
<b>Attach copies of receipts and e-mail the form to:</b> Chevron Adoption Reimbursement Sara Kashima KashimaS@chevron.com Employee Assistance and WorkLife Services		For office use only: Amount to be reimbursed: _____ _____ Date	