

## HOW DO I CERTIFY MY DEPENDENTS?

**STEP 1:** Review the list of the dependents you have enrolled and match each of them to a dependent type listed in the "Eligibility Rules and Documentation Required" section

**STEP 2:** For each dependent type you will find the eligibility rules and a list of document options required to verify that particular dependent type

**STEP 3:** Once you have matched your dependents to types, gather all the necessary documents, including the signed and dated Certificate of Dependent Eligibility Attestation and the dependent list sheet and forward to the Dependent Verification Center.

**Mail:** Dependent Verification Center, PO Box 1401, Lincolnshire, IL 60069-1401

**Secure Fax:** 877-965-9555

**Online Upload:** <http://resources.hewitt.com/conocophillips> For instructions, click on "Take Action". Then click on "Document Submission"

**If you have questions or need assistance, please call the Dependent Verification Center at 800-622-5501 or 718-354-1344. Representatives are available from 8 a.m. to 6 p.m. Central Time, Monday through Friday.**

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### **DOCUMENTATION REQUIREMENTS AND THINGS TO REMEMBER**

**-SEND COPIES ONLY!**

**-Black out social security numbers, account numbers, financial information or monetary amounts appearing on any documents submitted.**

-Only send the first page of your prior year Federal Tax Return that shows your dependents. *State Tax Returns are NOT accepted in lieu of Federal Tax Returns.*

-Documents proving joint ownership are: Mortgage Statements, Credit Card Statements, Bank Statements, and Residential Leasing Agreements listing both parties' names as co-owners. Additional documents are: current utility bill with both names, must be dated within last 6 months. Automobile title or registration showing joint ownership, current loan note or payment coupon demonstrating joint obligation on loan. *The joint ownership may be established prior to the current year; however, the statement provided must be issued within the last six months.*

-Proof of Marriage must be a government issued Marriage License or Marriage Certificate including the date of your marriage. *Church Issued Certificates are NOT acceptable.*

-Birth Certificates must be government issued Birth Certificates listing parent names. *Hospital issued certificates are NOT acceptable, unless the child is under three months of age.*

**VITAL RECORDS REQUEST:** *In some states and county clerk offices, it could take 4-8 weeks for vital records to come in (e.g. Illinois, Massachusetts, New York, etc). Also in some states and county clerk offices, the standard turn-round time is 6 months, although they are consistently delivered within 10-14 business days (e.g. California). Please order your documentation early in the verification process to ensure receipt.*

**PHOTOCOPYING VITAL RECORDS:** *Some states and county clerk offices prohibit the photocopying of vital records (e.g. Florida, Pennsylvania, Wisconsin, etc). Typically, there's a warning on the document stating that copying is not allowed. We recommend that dependents in these states obtain the non-certified vital record for the verification process which is usually available at a reduced cost compared to the certified vital record cost.*

**BIRTH CERTIFICATES LISTING PARENT NAMES:** *Some state and county clerk offices issue the short form certificate as a standard (e.g. Iowa, New Jersey, South Carolina, etc). Please obtain the long-form, including the parent's names, the same used to obtain a passport.*

*Disclaimer: The above may not include all states/county practices.*



**ConocoPhillips**  
**Certificate of Dependent Eligibility Attestation**

To verify your dependents, you MUST sign and return this Certificate of Dependent Eligibility Attestation, along with the required documentation and the completed Dependent List sheet on the Fax cover page.

I certify that the documentation provided is true and correct and meets the Definition of Eligible Dependents eligibility requirements as stated on the following pages. I understand that the falsification of documents or covering of dependents who do not meet the ConocoPhillips Medical and Dental Assistance Plan or the ConocoPhillips Retiree Medical and Dental Assistance Plan eligibility criteria may result in one, or more, of the following actions:

- The Plan has the right to request reimbursement of any claims for ineligible dependents.
- Participants can be subject to disciplinary action - up to and including termination of coverage for benefits and termination of employment.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**2017 Definition of Eligible Dependents\***  
**ConocoPhillips Medical and Dental Assistance Plan or ConocoPhillips Retiree Medical and Dental Assistance Plan**

Review the following definitions to determine if your dependents 1,2 are eligible for the ConocoPhillips benefit Plans.

**Definition of your Spouse**

Your legally married same or opposite gender spouse, including common-law spouse<sup>3</sup>. If you are divorced or have a legal separation agreement, your spouse is *not* an eligible dependent.

**Definition of your Child**

- Under the age of 26; **and**
- Your biological, legally adopted\*(includes foreign adoptions\*) or placed for adoption\* child; **or**
- Your stepchild, provided the parent is your spouse and you and your spouse either remain married and reside in the same household or your spouse died while married to you; **or**
- Your disabled\* child over age 26 (if disabled prior to age 26 and approved by the Plan within 30 calendar days of the earlier of reaching age 26 or initial eligibility).

**Definition of your Domestic Partner**

A person of the same or opposite sex who has demonstrated a commitment to a long-term relationship with you. You and your domestic partner\* must meet **all** of the following requirements:

- You intend to remain each others sole domestic partner\* indefinitely; **and**
- You are both at least 18 years old (or of legal age); **and**
- You are each mentally competent to enter into contracts; **and**
- You are not related by blood; **and**
- You haven't been married to each other; **and**
- You and your domestic partner\* are not married to anyone else; **and**
- You have the same principal place of abode for the entire calendar year; **and**
- Your domestic partner\* is a member of your household for the entire calendar year and intends to remain so indefinitely; **and**
- You have provided more than 50% of your domestic partner's\* total support\* for the entire calendar year; **and**
- The relationship does not violate local law; **and**
- You lived together for six months before enrolling your domestic partner\*, **and**

- You are jointly responsible for each others welfare and are financially interdependent .

**Definition of your Domestic Partner's Child:**

You can cover the biological or legally adopted\*(includes foreign adoptions\*) child of your Domestic Partner\* if:

- The child is under age 26 or Age 26 or older, provided the child was disabled prior to age 26 and coverage is approved by the Plan within 30 calendar days of the earlier of his or her reaching age 26 or initial eligibility after age 26 ; **and**
- The child receives over 50% of his/her support\* from you for the entire tax year; **and**
- The child has the same principal place of abode as you and is a member of your household for the tax year.

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1 If you enroll in Cigna Global Benefit option, refer to the Certificate of Coverage for any additional eligibility provisions.

2 You have an ineligible dependent (child, spouse or domestic partner\*), even if he/she meets the requirements above, if he/she:

- Is on active duty in any military service of any country (excluding weekend duty or summer encampments);
- Is not a U.S.citizen, resident alien\* or resident of Canada or Mexico;
- Is already covered under the Company's medical plan as an employee , retiree or as a dependent of either (including COBRA participants and excluding the UHC Retiree Medicare Supplement option and Retiree Dental - UHC option);
- Is the child of a domestic partner\* and has been claimed as a dependent on your domestic partner's\* or on anybody else's federal tax return for the year of coverage ;
- Is the child of a surrogate mother (is not considered the child of the egg donor) and does not qualify as a dependent otherwise;
- Is no longer your stepchild due to divorce, legal separation or annulment;
- Is a grandchild not legally adopted\* by you;
- Is placed in your home as a foster child or under a legal guardianship agreement ;
- Is the child of a domestic partner and the domestic partnership between you and your domestic partner has ended, even if your domestic partner's child continues to reside with you; or
- Is in a relationship with you that violates local law.

3 The common-law marriage must be consummated in a state that recognizes common-law marriage, and all state requirements must have been met.

\*The 2017 Definition of Eligible Dependents is a summary of Plan details. For complete Plan details, review the Employee/Retiree Benefits Handbook which is the Summary Plan Description (SPD) for the Plan at [hr.conocophillips.com](http://hr.conocophillips.com). An underlined word followed by an asterisk (\*) is defined in the Employee/Retiree Benefits Handbook. Every effort has been made to ensure the accuracy of this communication . If there is a conflict, the Employee/Retiree Benefits Handbook controls.

*This brief description of the Plan is meant to provide general information, but your entitlement to any benefits is governed by the actual terms and conditions of the Plan and arrangements for employees/retirees of ConocoPhillips Company. Eligibility, benefits, claims, participant rights, Plan administration, and other provisions are described in the Employee/Retiree Benefit Handbook and other materials furnished to you. The Plan sponsor reserves the right to amend or terminate this Plan or arrangement at any time, in its sole discretion, according to the terms of the Plan or arrangement. If you are in a job represented by a collective bargaining unit, the bargaining agreement may affect or alter the information shown in this summary.*

## ELIGIBILITY RULES AND DOCUMENTATION REQUIRED

Below is a list of eligibility rules and documents required to verify your dependent(s). In most cases, at least TWO forms of documentation are required for dependents. Please read carefully.

ID	Dependent Type	Age	Eligibility Requirements
LS	<b>Legal Spouse</b>	N/A	<ul style="list-style-type: none"> <li>Your legally married same or opposite gender spouse</li> <li>If you are divorced or have a legal separation agreement, your spouse is <i>not</i> an eligible dependent</li> </ul>

**Document Options for Verifying Eligibility:**

Government issued Proof of Marriage and Certificate of Dependent Eligibility Attestation (if married within the last 12 months)

**OR**

Government issued Proof of Marriage, Federal Tax Return filed within the last 2 years, and Certificate of Dependent Eligibility Attestation

**OR**

Government issued Proof of Marriage, Proof of Joint Ownership issued within last 6 months, and Certificate of Dependent Eligibility Attestation

CLS	<b>Common Law Spouse</b>	N/A	The common-law marriage must be consummated in a state that recognizes common-law marriage, and all state requirements must have been met.
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**Document Options for Verifying Eligibility:**

Notarized Affidavit of Common Law Marriage, Federal Tax Return filed within last 2 years, and Certificate of Dependent Eligibility Attestation

**OR**

Notarized Affidavit of Common Law Marriage, two Proofs of Joint Ownership issued within the last 6 months, and Certificate of Dependent Eligibility Attestation

ID	Dependent Type	Age	Eligibility Requirements
DP	<b>Domestic Partner</b>	Age 18 and over	<p>A <u>Domestic Partner*</u> is defined as a person of the same or opposite sex who has demonstrated a commitment to a long-term relationship with you. You and your <u>domestic partner*</u> must meet <b>all</b> of the following requirements:</p> <ul style="list-style-type: none"> <li>• You intend to remain each others sole <u>domestic partner*</u> indefinitely; <b>and</b></li> <li>• You are each at least 18 years old (or of legal age); <b>and</b></li> <li>• You are both mentally competent to enter into contracts; <b>and</b></li> <li>• You are not related by blood; <b>and</b></li> <li>• You haven't been married to each other; <b>and</b></li> <li>• You and your <u>domestic partner*</u> are not married to anyone else; <b>and</b></li> <li>• You have the same principal place of abode for the entire calendar year; <b>and</b></li> <li>• Your <u>domestic partner*</u> is a member of your household for the entire calendar year and intends to remain so indefinitely; <b>and</b></li> <li>• You have provided more than 50% of your <u>domestic partner's*</u> total <u>support*</u> for the entire calendar year; <b>and</b></li> <li>• The relationship doesn't violate local law; <b>and</b></li> <li>• You lived together for six months before enrolling your <u>domestic partner*</u>; <b>and</b></li> <li>• You are jointly responsible for each others welfare and are financially interdependent</li> </ul> <p>* see Employee/Retiree Benefits Handbook for definition</p>

**Document Options for Verifying Eligibility:**

Notarized Affidavit of Domestic Partnership, two Proofs of Joint Ownership issued within last 6 months, and Certificate of Dependent Eligibility Attestation

**OR**

Notarized Affidavit of Domestic Partnership, Federal Tax Return filed within last 2 years showing domestic partner as a dependent, and Certificate of Dependent Eligibility Attestation

BC	<b>Biological Child</b>	under the age of 26	<ul style="list-style-type: none"> <li>• Your biological child</li> </ul>
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**Document Options for Verifying Eligibility:**

Government issued Birth Certificate and Certificate of Dependent Eligibility Attestation (Hospital birth certificate or birth notice on hospital letterhead can be used for children under three months of age)

ID	Dependent Type	Age	Eligibility Requirements
AC	<b>Adopted Child</b>	under the age of 26	<ul style="list-style-type: none"> <li>Your <u>legally adopted child*</u> (under U.S. or foreign law) or child <u>placed for adoption*</u></li> </ul> <p>*see Employee/Retiree Benefits Handbook for definition</p> <p><b>Document Options for Verifying Eligibility:</b> Adoption Placement Agreement, Petition for Adoption, and Certificate of Dependent Eligibility Attestation <b>OR</b> Adoption Certificate and Certificate of Dependent Eligibility Attestation</p>
SC	<b>Step-Child</b>	under the age of 26	<ul style="list-style-type: none"> <li>Your legal spouse's biological child, provided the parent is married to you, and resides with you, or died while married to you</li> </ul> <p><b>Document Options for Verifying Eligibility:</b> Government issued Birth Certificate, Government issued Proof of Marriage, Federal Tax Return filed within last 2 years, and Certificate of Dependent Eligibility Attestation <b>OR</b> Government issued Birth Certificate, Government issued Proof of Marriage, Proof of Joint Ownership issued within last 6 months, and Certificate of Dependent Eligibility Attestation <b>OR</b> Government issued Birth Certificate, Notarized Affidavit of Common Law Marriage, Federal Tax Return filed within the last 2 years, and Certificate of Dependent Eligibility Attestation <b>OR</b> Government issued Birth Certificate, Notarized Affidavit of Common Law Marriage, two Proofs of Joint Ownership issued within the last 6 months, and Certificate of Dependent Eligibility Attestation</p>
DPC	<b>Domestic Partner Child</b>	under the age of 26	<ul style="list-style-type: none"> <li>The biological or <u>legally adopted *</u> (under U.S. law or foreign law) child of your <u>domestic partner*</u></li> <li>Must receive over 50% of his/her <u>support*</u> from you for the entire tax year</li> <li>Must have the same principal place of abode as you</li> </ul> <p>*See Employee/Retiree Benefits Handbook for definition</p> <p><b>Document Options for Verifying Eligibility:</b> Government issued Birth Certificate, Notarized Affidavit of Domestic Partnership, Federal Tax Return issued within the last 2 years showing your Domestic Partner and Domestic Partner's child as dependents (two Proofs of Joint Ownership and the Affidavit of Child Dependency can be supplied in lieu of tax return ) and Certificate of Dependent Eligibility Attestation</p>