



# Probationary Period Certification

## Rules and Form for Employer-Designated Probationary Period Regarding Concordia Plans Enrollment

If an employer has a probationary policy for new workers, enrollment of such workers in the Concordia Plans can be delayed until the completion of a probationary period. However, a copy of the Probationary Period Designation form (see reverse side of this sheet) must be on file with Concordia Plan Services.

If Concordia Plan Services does not have a copy of the employer's Probationary Period Designation form on file, it will be assumed that no probationary policy applies regarding Concordia Plans enrollment.

### Concordia Plan Services has established the following rules regarding the delayed enrollment of a new worker due to a probationary period requirement:

- When designating a probationary period, the employer must apply it equally to all of its new workers in the specified worker classification(s). For example, if an employer stipulates a 60-day probationary period for daycare workers, any person hired to be a daycare worker must complete the probationary period before becoming eligible to be enrolled in any of the Concordia Plans.
- If an employer does not complete and return a Probationary Period Designation form to Concordia Plan Services, workers will be deemed eligible to be enrolled in the Concordia Plans the first day of the calendar month following the date of full-time employment. If an employer wishes to apply a probationary period for its lay workers, it will be effective for all designated workers hired on or after the first of the month following receipt of the Probationary Period Designation form by Concordia Plan Services.
- The maximum probationary period for purposes of enrollment in the Concordia Plans is 60 days. For example, if you have elected a 90-day probationary period for other employment issues such as performance reviews, salary increases, etc., the probationary period for purposes of enrollment in the Concordia Plans will only be 60 days.

### Probationary Period Exclusions

Probationary periods may not be applied to:

- Ordained or commissioned ministers of religion who are on the roster of The Lutheran Church—Missouri Synod.
- Workers employed by employers participating in the Concordia Retirement Savings Plan (CRSP) that are considered Non-Qualified Church-Controlled Organizations by the IRS (e.g., universities, colleges, and most social service organizations).

### Important Dates Regarding Probationary Periods

The probationary period begins on the date the worker is hired, even though he/she may initially be hired as part time.

If you designate a probationary period, the full-time employment date used by Concordia Plan Services will be the next calendar day immediately following the expiration of the probationary period or 60 days after the date of hire, whichever is earlier.

The worker will be enrolled on the first day of the calendar month following the full-time employment date. For example: If a worker begins employment on April 15 and completes a 60-day probationary period on June 13, the date of full-time employment for Concordia Plan Services purposes is June 14. The worker is enrolled in the Concordia Plans effective July 1, which is his/her initial eligibility date.

A completed Enrollment Form must be received by Concordia Plan Services within 60 days of the worker's initial eligibility date; otherwise, enrollment in the Concordia Health Plan will not be available to the worker until the next Annual Open Enrollment Period unless the worker meets special enrollment requirements. Enrollment Forms are available on our website under Resources/Forms.

If you designate a probationary period, workers in the designated classification(s) begin earning benefits and have a right to benefits under any Concordia Plan only after that probationary period expires. There is no accrual of creditable service toward a future retirement benefit, no payment of a death or disability benefit, and no coverage for medical, vision or dental expenses during a probationary period.

**Probationary Period Designation**

PLEASE PRINT OR TYPE ALL INFORMATION IN BLUE OR BLACK INK

**A Employer Information**

Employer Name \_\_\_\_\_ Concordia Plan Services Employer Account Number (if known) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Employer Phone Number \_\_\_\_\_

Employer E-mail Address \_\_\_\_\_ Employer Fax Number \_\_\_\_\_

**B Probationary Period Certification**

I, \_\_\_\_\_, an officer of the  
*Print Name of Authorized Employer Representative and Title held at Employer*

employer named above, do hereby certify to Concordia Plan Services that at a meeting of the Governing Body of this participating employer – as authorized by the Constitution and Bylaws of this organization – the following probationary period designation was adopted.

Meeting date: \_\_\_\_\_ 20\_\_\_\_\_

**Please initial each of the following statements:**

- \_\_\_ A probationary period has been established by this organization for those workers included in the classification(s) selected.
- \_\_\_ The probationary period shall be applicable for the designated period and, for purposes of the Concordia Plans, shall not exceed sixty (60) days from the worker’s initial date of hire, including part-time employment.
- \_\_\_ Upon completion of the applicable probationary period, the worker will be enrolled in the Concordia Plans that have been adopted by this employer if he/she meets all other requirements for eligibility.
- \_\_\_ This policy shall be equally applied to all workers within the classification of workers indicated regardless of age, sex, or faith, hired on or after the first day of the month following the date that CPS receives this form.
- \_\_\_ **Probationary periods shall not apply, however, to ordained or commissioned ministers of religion who are on the roster of The Lutheran Church—Missouri Synod or to any workers at a Non-Qualified Church-Controlled organization (e.g., a university, college, or a social service organization) participating in the CRSP.**

*Please select worker classification(s) subject to a probationary period, as well as the length of the probationary period: You may select all non-rostered workers or a combination of non-rostered workers.*

Worker Classification	30-Day Period	60-Day Period	Other Period (Less than 60 days)
<input type="checkbox"/> All non-rostered workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _____ days
<input type="checkbox"/> Daycare/Preschool workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _____ days
<input type="checkbox"/> Clerical workers only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _____ days
<input type="checkbox"/> Maintenance/janitorial workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _____ days
<input type="checkbox"/> Contract or other lay teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _____ days
<input type="checkbox"/> Other (Please describe.) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> _____ days

**C Employer Representative Signature**

**X**

Signature of Authorized Employer Representative \_\_\_\_\_ Date \_\_\_\_\_

Printed Name of Authorized Employer Representative \_\_\_\_\_ Title or Office Held \_\_\_\_\_

E-mail Address of Authorized Employer Representative \_\_\_\_\_ Daytime Telephone Number \_\_\_\_\_

**Submit one copy of completed form to:**

Concordia Plan Services, Attn: Enrollment Services, P. O. Box 229007, St. Louis, MO 63122-9007 or FAX to: 314-996-1127