



Concordia Plan Services
 The Lutheran Church- Missouri Synod
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Enrollment Form

USE THIS FORM FOR ALL WORKER ENROLLMENTS EFFECTIVE PRIOR TO 1/1/2025

STEP 1 – EMPLOYER: Please complete all required sections and submit your digital signature. You will be prompted to enter your worker’s name and email address (participant 2) once you have completed your portion. You will enter your own information for participant 3 for the approval step. You will then receive an email from adobesign@adobesign.com with a link to verify your email address. After verifying your email address, your worker will receive an emailed link to complete and sign the document. You will receive a copy of the signed document via e-mail **AFTER** your worker has completed and signed his/her section.

STEP 2 - WORKER: Please complete all required sections and submit your digital signature. You will be prompted to enter your employer benefit representative’s name and email address once you have completed your portion. You will then receive an email from adobesign@adobesign.com with a link to verify your email address. After verifying your email address, your employer benefit representative will receive an emailed link to approve the document. You will receive a copy of the signed document via e-mail **AFTER** your employer benefit representative has approved the document. If you have questions about the status of your digital form submission, please contact your employer benefit representative.

STEP 3 - EMPLOYER: You will be sent an email to approve the document after the worker has completed and signed the document. Please review the information to ensure it is accurate. Reach out to the worker if there is missing or incorrect data on the form to revise before it is approved by you. By submitting your digital signature through Adobe Sign, this form will be submitted securely to Concordia Plans. You and your worker will receive a completed copy via e-mail for your records only. You do not need to send it to Concordia Plans.

A	Employment Information			
Employer Name		Employer ID Number		
Employer Address				
Employer City	Employer State	Employer Zip Code	Employer Phone Number	
Workers Occupation (Be specific e.g. write “Elementary Teacher” instead of “Teacher”)	Is worker hired to work more than 5 consecutive months?	* Does a probationary period apply for benefits?	Yes	No
			Yes	No
	This worker is a/an:	Hourly Worker	Salaried Worker	
Scheduled number of hours per week*	Job Designation:	Faculty	Non-faculty	
Full-Time Hire Date (mm/dd/yyyy)	Pay Frequency:	Bi-Weekly (26)	Monthly (12)	
Part-Time Hire Date (if applicable mm/dd/yyyy)		Weekly (52)	Semi-monthly (24)	
<p><small>*Any worker hired to work more than 20 hours per week AND more than five consecutive months is required to be enrolled in the Concordia Retirement Plan (CRP) and the Concordia Disability & Survivor Plan (CDSP). Any worker who is hired to work the minimum number of hours required for Concordia Health Plan (CHP) benefits, as designated by the employer’s Declaration of Hours Form on file at CPS, AND for more than five consecutive months is eligible to enroll in the CHP. Plan benefits normally begin the first day of the month coinciding with or following a worker’s hire date unless a probationary period established and on file with CPS.</small></p>				
<p><i>(Continued on next page)</i></p>				

B **Worker Information**

Rev Mrs. Junior Senior
 Dr. Miss II I
 Mr Ms. Worker's Name (Last, First, Middle Initial) Previous Last Name Other: _____

U.S. Social Security Number Date of Birth (MM/DD/YYYY) Gender

Worker's Address Email Address

City State Zip Code Phone

C **Worker Compensation Information**

WORKER COMPENSATION	A	B	C	D	E
EMPLOYER/PARISH	Basic Annual Cash Salary	Home Provided 25% of Column A	Annual Cash Housing Allowance Paid To Worker	Annual Cash Utility Allowance Paid to Worker	Annual Total Compensation (A+B+C+D)
Dual Parishes Only-Enter Total Compensation Received					

D **Minister of Religion (To be completed by worker)**

Will your name appear on the Synod's Roster of Ordained and Commissioned Ministers of Religion? Yes No
If Yes Complete the following:
 Will you be participating in Social Security? Yes No
 Were you placed recently at this employer by Synod's Board of Assignments? Yes No

Date of Assignment (MM/DD/YYYY) Date Studies Completed (MM/DD/YYYY) Name of LCMS School From Which You Graduated

Recent graduates assigned by the Synod's Board of Assignments are eligible for early enrollment in the CRP, CDSP, and CHP effective the first of any month following the receipt of their assignment and graduation, but not later than their normal effective date. If desired, enter the enrollment date here: _____

As a minister of religion enrolled in the CRP prior to 1982, with participation terminated for no more than 5 years, and whose self-employed status under Social Security has been in effect since December 31, 1981, I request enrollment in the CRP Traditional Option on the Full Basis.

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E	Marital Information (To be completed by worker)
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Marital Status

- Single - Never Married
 Married, Date.....
 Widowed, Date.....
 Divorced, Date

 Spouse's Full Name

 Spouse's Date of Birth (MM/DD/YYYY)

 Spouse's Social Security Number

Enroll In:
Medical **Dental** **Vision**

F	Child(ren) Information (To be completed by worker)
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You must complete this section to enroll your eligible child(ren). Failure to enroll your eligible child(ren) will result in decreased or lost benefits. A "child" shall mean your biological, legally adopted, step, and foster child. In certain situations, your grandchild or step-grandchild may be eligible to be enrolled as your dependent—contact Concordia Plan Services at 888-927-7526 for information. Please carefully read the following:

Concordia Disability and Survivor Plan (CDSP) - Life Insurance Benefits

Please list your eligible child(ren) as described in 1, 2, and 3 below. Enrolling eligible children provides life insurance protection for them. Please note that there are different eligibility requirements for the CDSP than the Concordia Health Plan. To be eligible under the CDSP, the child must qualify as your dependent for federal income tax purposes (or would qualify as such a dependent, but for exceeding applicable age or earning limits). All eligible children below will be enrolled in the CDSP.

1. Your unmarried child under age 21.
2. Your unmarried child age 21 up to age 26 if a full-time student in an accredited educational institution.
3. Your unmarried child who is 21 or over AND became totally disabled prior to attaining age 21 or became totally disabled while a full-time student at an accredited educational institution (subject to approval).

Note: If both parents are active workers enrolled in the CDSP, each parent should enroll the dependent child(ren) in the CDSP.

Concordia Health Plan (CHP) - Medical, Dental, Prescription, etc., Benefits

To enroll your child(ren), review 4 and 5 below to determine their eligibility as dependents for the CHP.

4. Your child, up to age 26, regardless of student, marital or disabled status..
5. Your unmarried, totally disabled child age 26 and older who became disabled before attaining

THE FOLLOWING CHILD(REN) IS/ARE TO BE ENROLLED IN THE CDSP AND/OR CHP:

- *If adding a foster child or legally adopted child, please include legal documentation.*
- *If adding a newborn, do not wait for a Social Security number (SSN) to be issued to add the child. Once the newborn's SSN is issued, submit it to Concordia Plan Services.*
- *If listing more children than space provided, attach sheet giving information as requested below.*

Dependent's Full Name	Relationship	Gender	Date of Birth	Social Security	Enroll In		
					Medical	Dental	Vision
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

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G**Concordia Health Plan (To be completed by worker)**

If your employer has adopted the Concordia Health Plan (CHP) and you meet the eligibility requirements, you may enroll yourself and your eligible dependents by choosing a plan Option and Class of Coverage below and completing Sections E and F. Please contact your employer for information regarding any cost you may incur. You can only elect an Option being offered by your employer.

If you are declining to enroll in the CHP, please check the box below and complete Section H.

I decline enrollment in the CHP. I have read and I understand the Terms of Special Enrollment included on this form.

Bundled CHP Options: Bundled CHP Options include medical, dental and vision coverage.

Indicate your enrollment decision by checking the appropriate box below. If you elect to enroll in a Bundled CHP Option, please also select the Class of Coverage.

- | | | |
|-----------------------------------|-----------------------------------|---------------------------------------|
| <input type="checkbox"/> Option A | <input type="checkbox"/> Option C | <input type="checkbox"/> Option E |
| <input type="checkbox"/> Option B | <input type="checkbox"/> Option D | <input type="checkbox"/> Option HDHP* |

*If your Employer offers the same medical option through different carriers, select your carrier: BCBS UMR

Select one Class of Coverage that will apply to your Medical, Dental, and Vision coverage:

- Self Only Self & Spouse Self & Child(ren) Self, Spouse, & Child(ren)

Unbundled CHP Medical Options: Unbundled CHP Medical Options are for Medical coverage only.

Indicate your enrollment decision by checking the appropriate box below. If you elect to enroll in an Unbundled CHP Medical Option, please also select the Class of Coverage.

- | | | |
|--|--|--|
| <input type="checkbox"/> Healthy Me Copay A* | <input type="checkbox"/> Healthy Me HSA A* | <input type="checkbox"/> Whole Health |
| <input type="checkbox"/> Healthy Me Copay B* | <input type="checkbox"/> Healthy Me HSA B* | <input type="checkbox"/> Whole Health 1000 |
| <input type="checkbox"/> Healthy Me Copay C* | <input type="checkbox"/> Healthy Me HSA C* | <input type="checkbox"/> Whole Health 2000 |
| <input type="checkbox"/> Healthy Me Copay D* | <input type="checkbox"/> Healthy Me HSA D* | <input type="checkbox"/> Select HMO-C |
| <input type="checkbox"/> Healthy Me Copay E* | <input type="checkbox"/> Healthy Me HSA E* | <input type="checkbox"/> Select HMO-C 2000 |

*If your Employer offers the same medical option through different carriers, select your carrier: BCBS Cigna UMR

Select one Class of Coverage for your Medical coverage:

- Self Only Self & Spouse Self & Child(ren) Self, Spouse, & Child(ren)

Unbundled Dental Options: Unbundled Dental Options are for Dental coverage only.

Indicate your enrollment decision by checking the appropriate box below. If you elect to enroll in an Unbundled Dental Option, Please also select the Class of Coverage.

- Dental Basic Dental Plus Dental Premium

Select one Class of Coverage for your Medical coverage:

- Self Only Self & Spouse Self & Child(ren) Self, Spouse, & Child(ren)

Unbundled Vision Options: Unbundled Vision Options are for Vision coverage only.

Indicate your enrollment decision by checking the appropriate box below. If you elect to enroll in an Unbundled Vision Option, Please also select the Class of Coverage.

- Vision Basic Vision Premium

Select one Class of Coverage for your Medical coverage:

- Self Only Self & Spouse Self & Child(ren) Self, Spouse, & Child(ren)

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H	Reason for Non-Enrollment in Concordia Health Plan (To be completed by worker)
<p>Complete only if you are waiving CHP Coverage</p> <p>I am covered under my spouse's or parent's group health plan (converge by virtue of employment, including military service).</p> <p>I am covered as a dependent under my spouse who is also enrolled in CHP as a worker.</p> <p>I am covered under a military plan (TRICARE) as a retiree, a state mandated plan (e.g. Hawaii), a Medicare Supplemental plan or other government plan (e.g. Medicaid), or another country's mandatory health plan while residing outside of the United States.</p> <p>I am covered under the health plan of a non-LCMS employer for whom I am currently working, a former employer's health plan or COBRA coverage.</p> <p>I have purchased coverage through the Health Insurance Marketplace made available by the Affordable Care Act and was eligible for a Premium Tax Credit at the time such coverage was purchased.</p> <p>I am not eligible for enrollment at this time due to the number of hours worked.</p> <p>I am not enrolling for some other reason _____</p>	
I	Concordia Retirement Plan and Concordia Disability and Survivor Plan
<p>If your employer has adopted the Concordia Retirement Plan (CRP) and the Concordia Disability and Survivor Plan (CDSP) and you meet the eligibility requirements, you will be enrolled in these plans. The plans are funded by your employer to provide you with enhanced financial security into retirement, should you experience a disabling event, or in the event of your or your enrolled dependents death. Therefore, it is important for you to list all your eligible dependents in Section E and F.</p>	
J	Personal Spending Accounts
<p>Your employer may offer tax-advantaged accounts to help you pay for out-of-pocket health care costs. These accounts include Limited Purpose Flexible Spending Accounts (LPFSA), Dependent Care Flexible Spending Accounts (DCFSA), Flexible Spending Accounts (FSA) and Health Savings Accounts (HSA). Confirm with your employer which benefits are available to you and visit ConcordiaPlans.org/enroll or contact CPS at 888-927-7526 to access the appropriate enrollment form(s).</p>	
K	Supplemental Life and Accidental Death and Dismemberment Insurance
<p>All full time workers are eligible to enroll in Supplemental Life or Accidental Death and Dismemberment (AD&D) for themselves and qualified dependents if their employer is participating in any of the Concordia Plans and agrees to remit payments. Eligibility requirements for children in both of these coverages follow the same guidelines of the Concordia Disability and Survivor Plan (CDSP). Once you receive a benefit confirmation from Concordia Plans, you may enroll in either or both of these additional plan options. Visit ConcordiaPlans.org/enroll or contact CPS at 888-927-7526 to access the appropriate enrollment form(s).</p>	
L	Accidental Injury and Critical Illness Insurance
<p>Your employer may offer these benefits which can provide lump sum payments for qualified expenses resulting from injury or illness. Confirm with your employer which benefits are available to you, and visit ConcordiaPlans.org/enroll or contact CPS at 888-927-7526 to access the appropriate enrollment form(s).</p>	
M	Worker Signature
<p>The information entered on this form is current and correct to the best of my knowledge.</p> <p>X _____</p> <p>Signature of Worker Date (MM/DD/YYYY)</p>	
<p><i>(Continued on next page)</i></p>	

N	Employer Signature	
<p>The information entered on this form is current and correct to the best of our knowledge. We agree to obtain from the worker, any portion of the cost for participation required from the worker according to the provisions of the Concordia Plans, and to remit such portion along with the portion required by us as the worker's employer.</p>		
<p>X _____</p>		
Signature of Authorized Employer Representative		Date (MM/DD/YYYY)
_____		_____
Printed Name of Authorized Employer Representative		Title or Office Held
_____		_____
Email Address	Daytime Phone Number	
_____	_____	

Terms of Special Enrollment

You and/or your eligible dependents may be able to enroll in the Concordia Health Plan at a later date under the special enrollment provisions if you decline CHP coverage due to coverage in another health plan.

If you are declining enrollment for yourself or your dependents (including your spouse) because of other health insurance or group health plan coverage, you may be able to enroll yourself and your dependents in the CHP if you or your dependents lose eligibility for that other coverage (or if the employer stops contributing toward your or your dependents' other coverage).

However, you must request enrollment **as soon as possible but no later than 60 days** after your or your dependents' other coverage ends (or after the employer stops contributing toward the other coverage). In addition, if you have a new dependent as a result of marriage, birth, adoption, or placement for adoption, you may be able to enroll yourself and your dependents. However, you must request enrollment in writing **within 60 days** after the marriage, birth, adoption, or placement for adoption. Failure to enroll within the 60-day period may result in enrollment being delayed until the next open enrollment period.

To request special enrollment or obtain more information, contact Concordia Plan Services at 888-927-7526