

ONBOARDING WITH IJOIN

C H E C K L I S T

S U P P O R T @ I J O I N S O L U T I O N S . C O M



COLLECT



UPLOAD



TEST



FINALIZE



OPEN ENROLLMENT

1 Fill out all aspects of shared spreadsheet including each sheet + yellow field.

2 Collect beneficiary form + payroll deduction form.

3

Send both documents in step 2 to:
support@ijoinsolutions.com

With the subject line: **beneficiary/payroll forms (your company name)**

4

iJoin completes plan setup internally.

5 Participant list is sent via .csv to iJoin

6 iJoin uploads participant list into system

7

24-hour testing before enrollment for participants goes live.

Login + enrollment run through as test participant

8

Open enrollment for participants goes live.