**iJoin Onboarding Process 2.0 (3-14 day process)**

**Advisor & Plan Sponsor sign license agreement**

1. **iJoin sales rep receives signed paperwork.**
2. **Sales rep sends signed form to Client Services (CS) department where invoice is prompted through panda docs.**
3. **Client Services and plan sponsor establish Enrollment Date**
4. **Send welcome e-mail –** “tee-up” what happens next
5. **Set up CS introduction call:**Sales personnel, RM (relationship manager), Advisor, RK (record keeper), Plan Sponsor:  Conference call to make introductions (call in wk2.)

* Sales person to set up call based on all parties calendar availability.

1. **New account set up in Admin section**

**RM introduction**

1. **Have CS intro call**- IJS sales rep, ADV (advisor), PS (plan sponsor), IJS RM
2. **Request/send forms**
   1. Forward setup document via Google docs
   2. RK Authorization form (sent to PS)
   3. Signed Authorization form returned to RM
   4. SPD requested
   5. Send PS authorization to RK (RM)
   6. Establish call with RK- introduction, establish data format
   7. High resolution logo from PS in JPEG
   8. Establish training dates and times
   * Reporting
   * Messaging
   * Plan Setup
   * Plan Management
   * Participant Upload
   * Import and Export
3. **Send Welcome package to PS and ADV**
4. **Establish weekly update call and send calendar invites**

**Set up plan in iJoin Admin**

1. **Have call with RK**

* Establish format and customize template for file transfer
* Share our current template to RK (See Participant Upload template in New Client Set up Folder)
* Record Keeper Reporting: Establish procedure on frequency of sending the data to the RK

1. **Gather all outstanding requested documents from week 2**

* Store those in client folder under plan set up

1. **Establish account access**- CS to set up individual access points
2. **New Account Set Up:**  CS is to work with the advisor and/or record keeper to load all of the necessary data into the iJoin Admin system to start the participant enrollment process (See plan upload template.)
3. **RM:** Request RK file transfer.
4. **Enrollment Dates**: CS to work with the advisor and plan sponsor to set up sessions and participants per session.  Communicate enrollment dates to all parties.
5. **Plan Sponsor Email Template:**  CS to send over customizable announcement email template (To be created)
6. **Printing**: CS to confirm the mailing of collateral and communicate with plan sponsor.
7. **Conference Call-** weekly update with plan sponsor, advisor, and RK.

**Final Systems Check**

1. **Confirm all requested forms are received and implemented**

* PS authorization
* SPD
* Participant data upload from RK
* Fund allocation upload

1. **Confirm plan setup**
2. **Confirm record keeping data transfer is updated and complete**
3. **Collateral**: Plan sponsor to hang collateral in workplace.
4. **Conference Call Update**: CS to schedule and initiate campaign update with plan sponsor, advisor, RK.

**System Test**

1. **Record Keeper:**CSto get the latest records from the record keeper.

* Upload most recent record and compare against original

1. **Advisor Approval:** CS to check with Advisor to see that plan is set up correctly (email report at some point).

* Review default settings
* Review fund line up to include default option and custom portfolios
* Review session dates

1. **Test Run:** CS to enroll a test participant to check the system for any issues.
   * Fred Flintstone
   * Barney Rubble
   * Wilma Flintstone

4. **Conference Call:**CS to communicate to all parties system is setup, tested and ready.

**Open Reenrollment**

1. **System Adjustments:**  CS to work with advisor on various issues.
2. **Data Analysis:**  CS to review the enrollment data.
3. **Data Transfer:** CS to transfer information to RK on a weekly basis.
4. **Reporting:** CS to communicate to all parties how to access and read the dashboard.