



**ijoin**

# Implementation Guide

LAST UPDATED :: NOVEMBER 2023

©2023 iJoin. All Rights Reserved.

LDI-MAP LLC (d.b.a. iJoin) is a registered investment adviser with the State of Arizona - 16430 N. Scottsdale Road Suite 200, Scottsdale, AZ 85254 - (480) 300-4900.

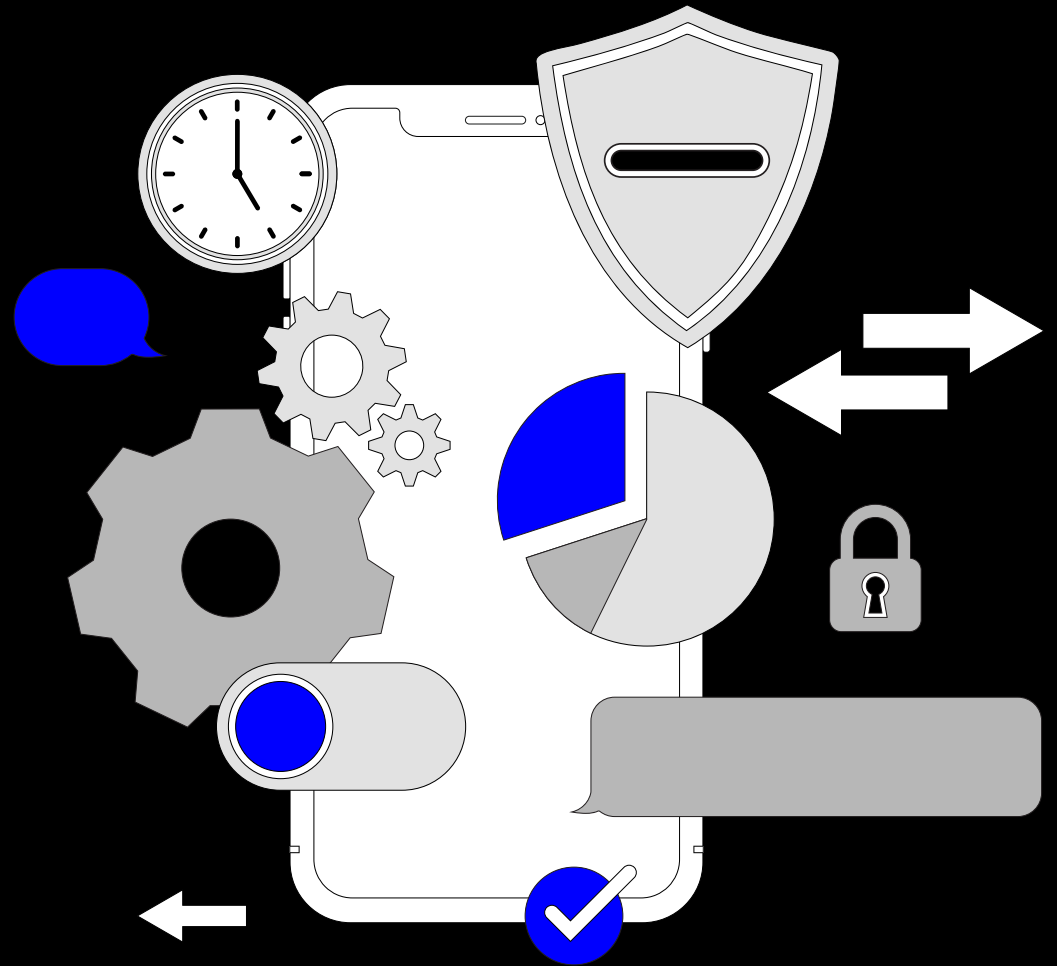
See our ADV Part 2A Brochure at [www.ijoinsuccess.com](http://www.ijoinsuccess.com)

# Welcome!

On behalf of the entire iJoin team, we want to thank you for selecting **iJoin** as your digital plan enrollment solution.

This Implementation Guide will provide you with the necessary steps and timeline to get started using **iJoin**. We've documented each step and provided everything you need to replicate the implementation process across your client base as desired.

Our goal is to make the implementation process easy. If you have any questions, we're just a quick phone call away!



Contact iJoin Support

[iJoinSupport@iJoinSuccess.com](mailto:iJoinSupport@iJoinSuccess.com)

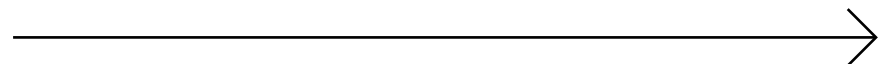
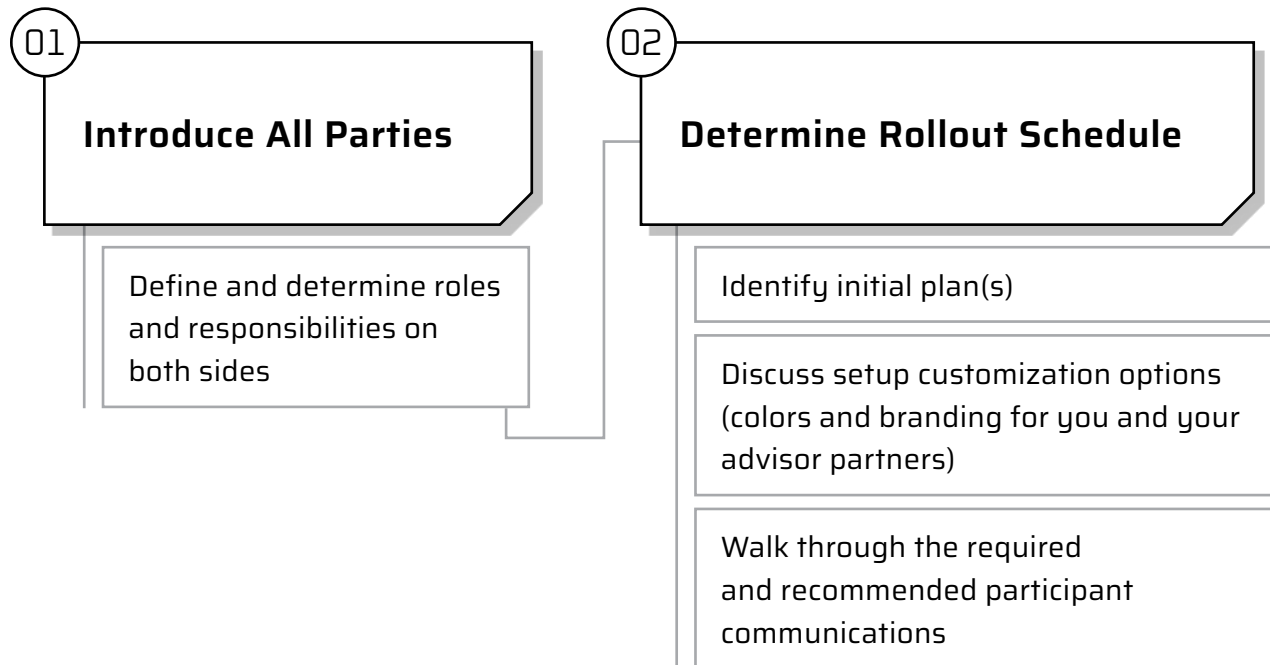
**Let's get started**

# First Things First

---

The first step in the implementation process is to schedule a partner kick-off call.

**The purpose and goals of the kick-off call are:**



# Next Steps

---

We will schedule and conduct a separate web-based training and implementation discussion with your assigned admin team member(s). We'll walk you through the Relius specific setup options, steps, and data flow so your team is comfortable with iJoin operations.

01

If a link between iJoin and Relius account has not already been established, we'll work with your admin team to setup and test the web service connection that enables the bi-directional data below between your Relius system and iJoin.

We will then sync the plan and census data from Relius to iJoin via the web service integration. This sync will automatically bring over all plan specs, fund and census info required for setup on the iJoin platform.

01

We will ensure that you have the desired payroll, sponsor or administrator notifications setup for the intended plan(s).

02

As a final setup step, should you wish to incorporate a risk tolerance questionnaire into your iJoin experience, we will work with you to get this set up and properly mapped to the applicable investments that were synced from Relius in the previous step.

# Upon Launching Your Enrollment Site

---

01

After we have established the beginning of the enrollment period for your plan(s), we can assist in sending out any email communications to the employees that will be directed to their plan's enrollment site.

02

As participants enroll, data will be automatically fed into your Relius system and notifications will be sent to the designated individuals.

03

Need support? Reach us at

[ijoinssupport@ijoinssuccess.com](mailto:ijoinssupport@ijoinssuccess.com)

We'll assist you as promptly as possible.

**We look forward to  
supporting your growth!**