New Client Guide

Advisor Cheat Sheet

Prospecting

Run a Proposal, Quote and Benchmarking from your Advisor Dashboard.

Collect client information – optional Corporate and Employee enrollment forms can be found in your Resources, along with an import spreadsheet for large groups.

Onboarding your Client

Select the Client tab – click "Add a Client".

Company Profile – complete required information including client details, corporate bank information and fees for the company profile.

Plans – Build out your client's custom plan design. For more information on plan types, go to resources or run a proposal.

Add-ons – Select the chosen add-ons or choose to opt out - this step is optional and can be added now or at a later date.

Plan Administrator - Add 1 or more Plan Administrators. If the Plan Administrator will also be an employee with a spending account, save time with the 'auto-create- employee feature to avoid duplicate data entry.

Note: The Plan Administrator must login and e-sign the Terms and Conditions prior to launching the plan to employees. You cannot queue up the emails to employees until the PA signs it.

Employees - Employee data can be added by the advisor or Plan Administrator. The process varies slightly based on group size. Ongoing management of employees can be handled by the Plan Administrator.

Required information for employee profiles include:
First and Last Name, DOB, Email Address, Gender, Province of Residence and which Plan/Class they will be tied to.
Employees will be prompted to add their banking information and dependents if applicable.

Collect employee information through Employee Enrolment Forms, or for groups of 10 + use the Import Spreadsheet in your Resources.
Groups with less than 10 employees – Click Add Employee and complete the required steps
Groups with more than 10 employees – send your completed Import Spreadsheet to support@getmyhsa.com

Send Welcome Emails

Once the employees have been added and you've had a chance to review everything, you can send out the welcome e-mails. Jump to the Employees page in the client profile and open Welcome Email Settings. You can select the current date or a future date for the e-mail to go out.