HIGH INTEREST SAVINGS ACCOUNT INSTRUCTIONS

Alberta Municipalities ■ Strength in Members

Getting started with HISA

The following provides an overview of the steps to setting up HISA for your organization. If you encounter any issue or have any questions about the HISA process, please reach out to us at HISA@abmunis.ca – we are happy to help!

Enrolment of a New Participant into HISA

1. Fill in Form 0 to request access to Synergy, the completed form should be emailed to HISA@abmunis.ca
2. Once you receive an email invitation to Synergy, follow the sign-in instructions section of this document to access the site
3. In Synergy, navigate to the folder **Onboarding > Enrolment Forms > Templates**; a copy of the blank enrolment forms can be found in the document titled *HISA – Enrolment Forms*
4. Complete Form 1 to Form 6 (Form 7 is for information only)
5. In Synergy, upload completed forms to the folder **Onboarding > Enrolment forms > Completed Forms**
6. Once the In-Trust account setup is completed, the administrator at Alberta Municipalities will email the participant with a confirmation

Make a Deposit

1. In Synergy, navigate to the folder **Transactions > Templates**
2. Download the document titled *HISA - Form 8 - Deposit Form*
3. Follow the instructions in the Form to make a deposit into your HISA In-Trust account

Make a Withdrawal

1. In Synergy, navigate to the folder **Transactions > Templates**
2. Download the document titled *HISA - Form 9 - Withdrawal Form*
3. Follow the instructions in the Form to make a withdrawal from your HISA In-Trust account

Viewing HISA Account Statements

Participants will be able to access HISA account statements via the Doxim website. Upon enrollment into the HISA program and the subsequent opening of the Participant's In-Trust Account, Canadian Western Bank ("CWB") will provide the Participant individual access and login credentials for the purposes of accessing monthly statements.

1. In Synergy, navigate to the folder **Onboarding > Doxim Instructions**
2. Download the document titled Intro to Doxim for details on how to access Doxim and to view statements

Accessing Alberta Municipalities Synergy

Built on an updated SharePoint platform, Alberta Municipalities launched a Synergy Site with improved functionality, enhanced user experience, and a refreshed design for our members.

Accessing and Navigating the Synergy Site

Follow the instructions in the Signing into Synergy section get access to Synergy for the first time. You will need to respond to the email invitation to gain access to your site. Didn't get an email? Or accidentally deleted it? Don't worry – email HISA@abmunis.ca.

Once you have successfully signed in to the Synergy site, you will be able to access all of the instructional documents and forms that have been uploaded. As part of this instruction document, we have included an overview of the folder structure to get you up and running with the new site.

If you encounter any challenges with accessing Synergy or your enrolment, please contact Alberta Municipalities Synergy Support by email at HISA@abmunis.ca.

Signing into Synergy

Responding to an Email Invitation

Users of our Synergy website will receive an invitation email notice to the website:
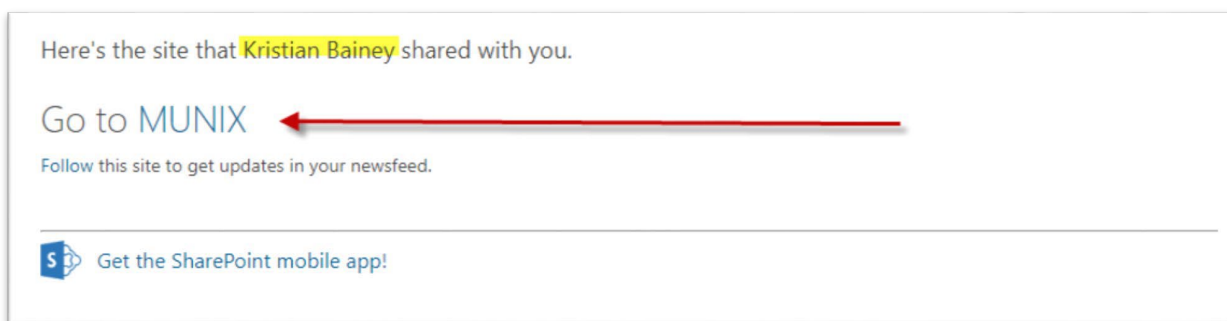
Once you click on the link in the email, an internet web browser will open up automatically to a Welcome to SharePoint Online page.

You will have two options for signing in: Microsoft account or Organizational Account.

- Select Microsoft account - **you will use this option**
- **Do not select Organizational account** even though it states to select it when using your work email
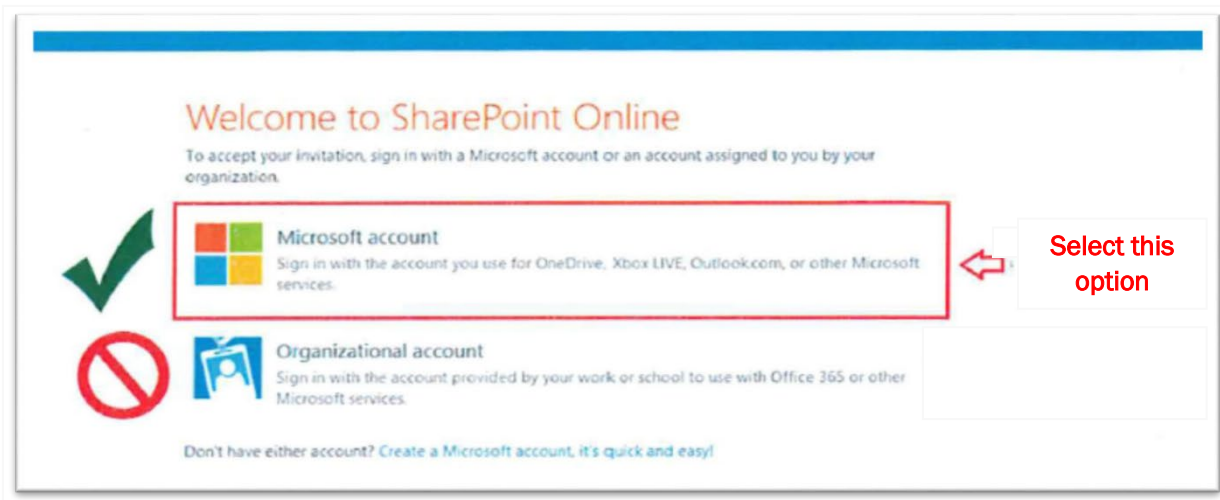

You will then be prompted to sign-in. Use the email account that received the initial email invitation.

For example, if you received the invitation at john.doe@yourmunicipality.com, then sign in using this same email address.

Click **Next**.

a) **For email accounts accessed through Microsoft**

If you access your email through a Microsoft product (Outlook, Hotmail, LIVE, OneDrive, Xbox), then signing in will be simple - just sign in with your email address and your associated password, then click **Next**.
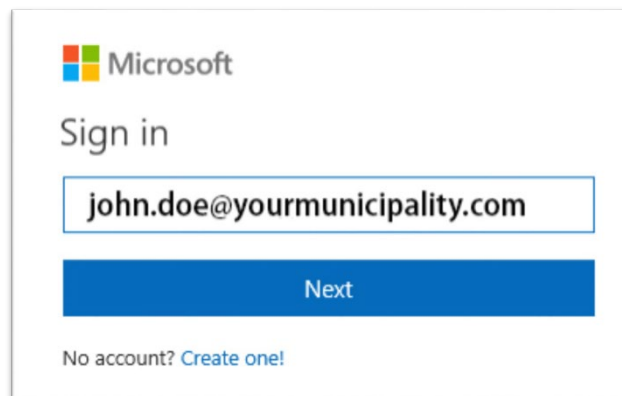

b) **For non-Microsoft email accounts**

If you do <u>not</u> access your email through a Microsoft product (e.g. your email is a Gmail account, TELUS, Shaw, etc., and you sign in through an internet browser and don't use Microsoft Outlook), you will get a message that says that your Microsoft Account doesn't exist. This is normal. Select **"Create one!"**
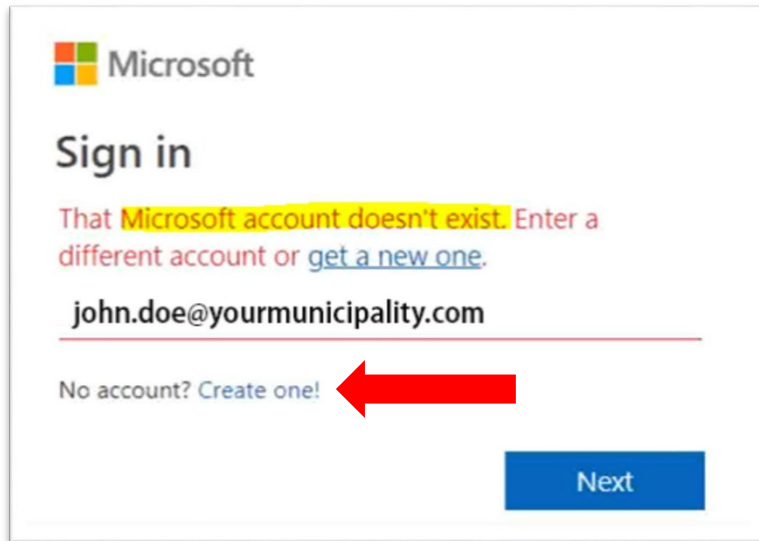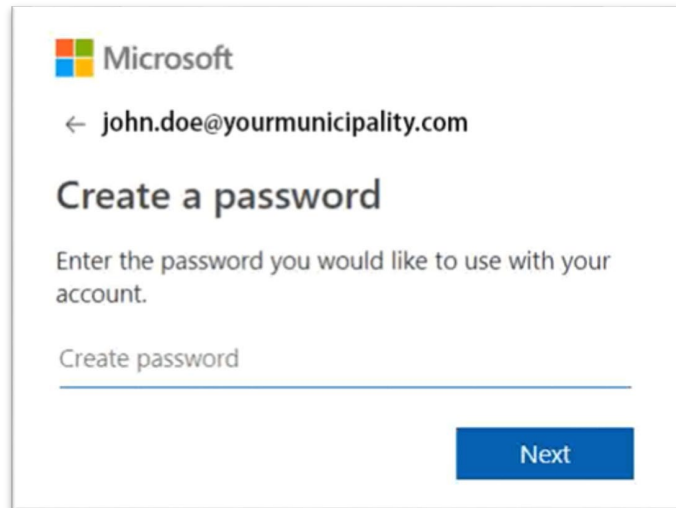

You will be prompted to create a Microsoft account using your existing email address. This will link your email with Microsoft, which will allow you to access the Synergy site.

Click **Next**.
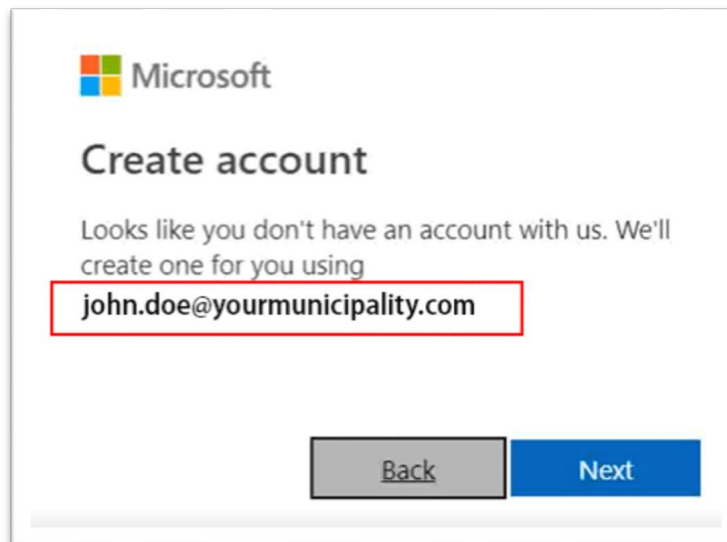
You will need to create a password for this account. When creating a password, we recommend following best practices such as having a combination of upper and lowercase letters, numbers, and special characters.
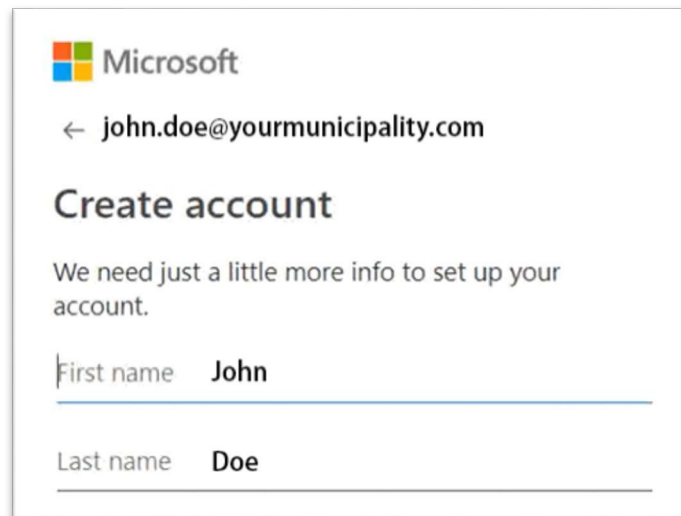
Click **Next**.

You will then be asked to **enter your first and last name**. Please enter a valid name as this information may be required if you forget your password and need it reset.
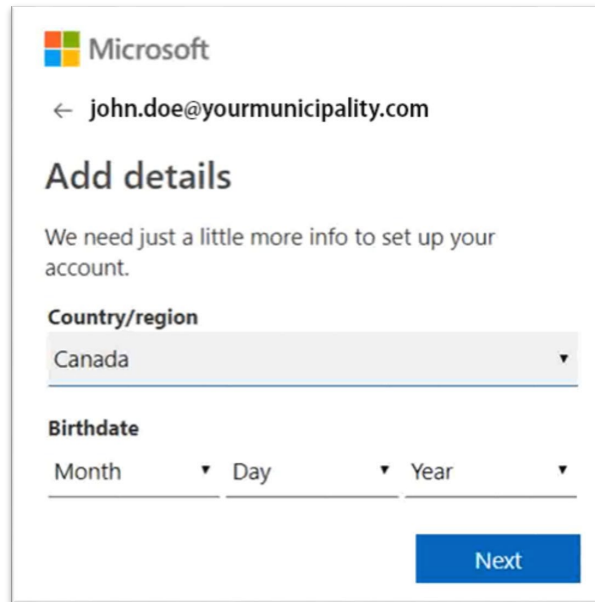
 Click **Next**.

Confirm your region (Canada) and enter your birthdate. Again, enter a valid birthdate as this information may be required if you forget your password and need it reset.

Click **Next**.

You should now be able to access the Synergy site. If you have followed the steps and still cannot access Synergy, or you can log-in but do not have access to your business area section on the site, please contact Alberta Municipalities Synergy support at HISA@abmunis.ca.

Basic Synergy Site Layout Navigation

Welcome to the Synergy site! Here is some basic information to help you navigate the site.

Visiting your Synergy Page

To access your page on Synergy, click on the "Go to ..." link from your email:
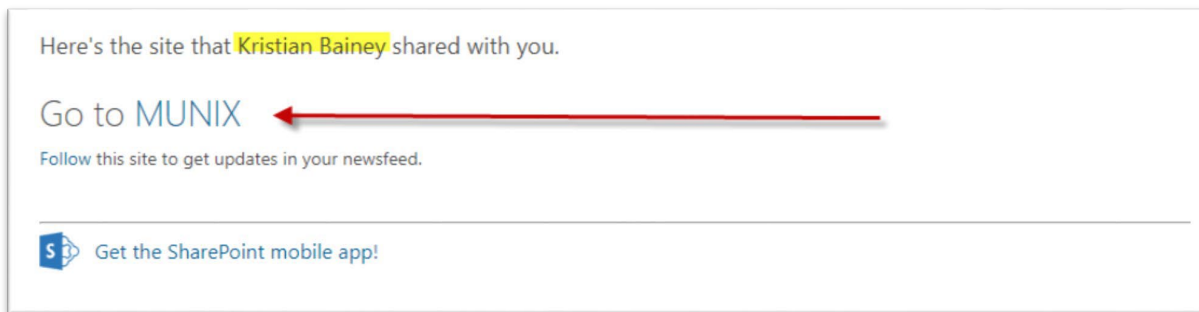
You will be taken directly to your own section on the Synergy site that is accessible only to you and designated people from your organization.
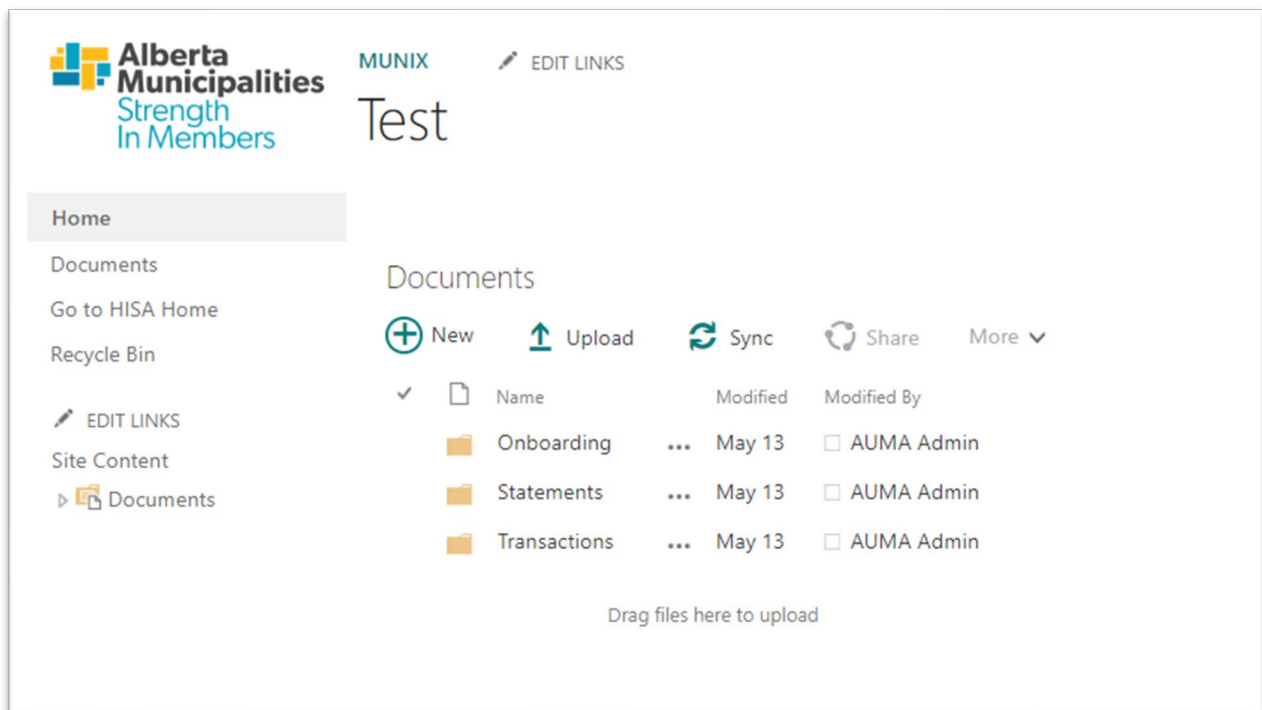
This is where you will find all the documents and information pertaining to HISA. The following section will detail the Synergy folder structure.

New Synergy Folder Structure

Alberta Municipalities Investment Services Folder Structure

The following outlines the new folder structure for the Alberta Municipalities Investment Services section of the Synergy website:

- Onboarding
    - Enrolment forms
        - Templates – blank copies of the Enrolment forms can be downloaded from this folder by the Participant
        - Completed Forms – copies of the completed Enrolment forms signed by the authorized individual(s) need to be uploaded to this folder
        - Change Requests – copies of documents completed and signed by the Participant, if any changes are required to their account information. Alberta Municipalities staff will guide the Participant's representative on completing the required forms
    - Doxim Instructions – Doxim is where Participants will be able to view HISA account statements. Once a Participant has enrolled into the HISA program, Canadian Western Bank (CWB) will provide the Participant with login credentials
- Transactions
    - Deposits – copies of the completed deposit forms signed by the Participant need to be uploaded to this folder; deposit transaction confirmations can also be found here
    - Withdrawals – copies of the completed withdrawal forms signed by the Participant need to be uploaded to this folder; withdrawal transaction confirmations can also be found here
    - Templates – blank templates to be used by Participant for HISA Deposits and HISA Withdrawals