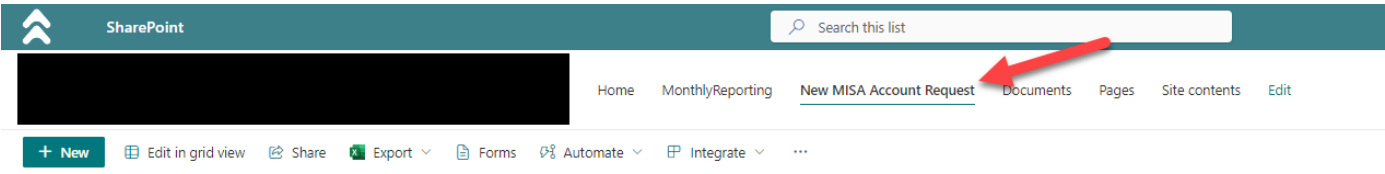
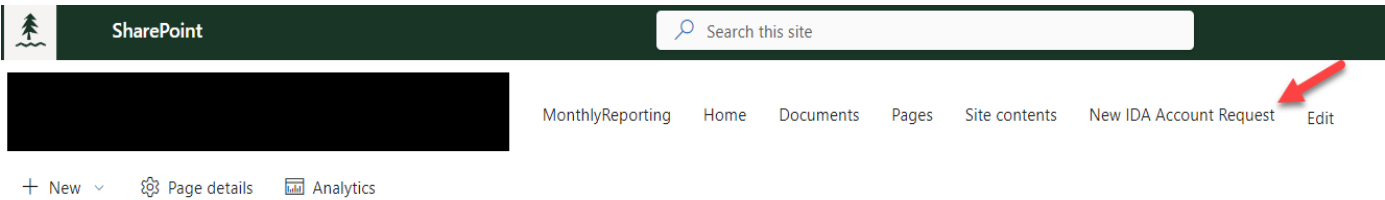


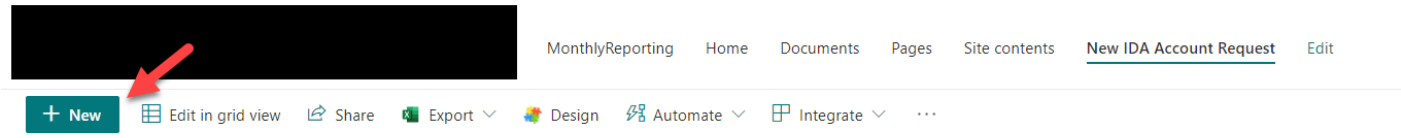


# IDA/MISA New Account Request via SharePoint

Navigate to your Provider Columbia SharePoint page.  
Select the “New IDA/MISA Account Request” at the top of the page.

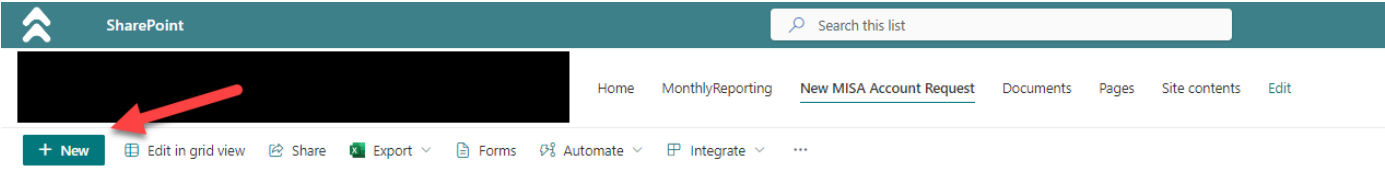


Select “New” to add a new request.



New IDA Account Request ☆

Participant Legal Name ▾	Submitter Name ▾	Submission Date ▾	Banker Name ▾	Status ▾	Digital Branch ... ▾	+ Add column
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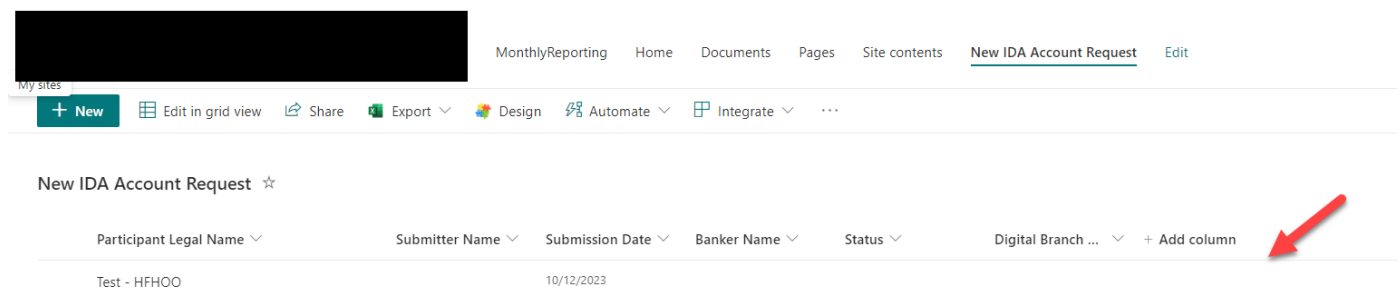


Complete the applicable fields for the New Account Request.

- Saver Legal Name: Enter Saver's name.
- Submission Date: Enter the date you are submitting the request.
- Submitter Name: Enter your own name.
- How is Columbia Bank receiving the saver's personal info for the account: Select the applicable option.
  - Phone – select this option if the Banker needs to call the Saver to collect their personal info.
  - Provider – select this option if you will be attaching the completed IDA/MISA Saver Information Form to this request.
  - **NOTE** – do not submit a Sharepoint request if the Saver will be going into their local Branch to open the account. The Saver **MUST** bring their Authorization Letter with them to the branch. For this option, nothing will be recorded in Sharepoint, such as status updates, comments/notes, account number, etc.
- Saver Phone Number: Required if Banker needs to reach out to the Saver.
- Saver Email Address: Required if Banker needs to reach out to the Saver, or if the Saver will be signing via DocuSign.
- Provider Notes to Digital Branch: Add any applicable notes the Banker/Columbia Bank will need to know in order to open the account.
- Banker Name: Do not place anything in this field.
- Status: Do not update the status. Leave “new” which will notify the Digital Branch Banker to work the request.
  - Providers may update the status to “Expired” if the account is not completed, and the Authorization Letter expires. In this case, add a note in the Provider notes section, update the status to Expired, and submit a new request with an updated Authorization Letter.
- Digital Branch Notes: Do not add any information in this field. Check this field periodically to see notes from the Banker.
- Account Number: Do not add any information in this field. The Banker will add the new account number in this field once the account has been opened (not necessarily funded).
- Attach the following documents:
  - Completed IDA/MISA Saver Information Form (if applicable)
  - Authorization Letter – Confirm the letter is not expired and that it's signed by an authorized individual.

Select “Save” to submit the request.

Once the request has been submitted, you will see the request added to the list.



My sites						
<a href="#">MonthlyReporting</a> <a href="#">Home</a> <a href="#">Documents</a> <a href="#">Pages</a> <a href="#">Site contents</a> <a href="#">New IDA Account Request</a> <a href="#">Edit</a>						
<a href="#">+ New</a> <a href="#">Edit in grid view</a> <a href="#">Share</a> <a href="#">Export</a> <a href="#">Design</a> <a href="#">Automate</a> <a href="#">Integrate</a>						
New IDA Account Request ☆						
Participant Legal Name ▾	Submitter Name ▾	Submission Date ▾	Banker Name ▾	Status ▾	Digital Branch ... ▾	+ Add column
Test - HFHOO		10/12/2023				



HomeMonthlyReportingNew MISA Account RequestDocumentsPagesSite contentsEdit

+ New

Edit in grid viewShareExportFormsAutomateIntegrate

New MISA Account Request

☆☺

Participant Legal Name	Submitter Name	Submission ...	Status	Digital Branch ...	Account Number	Banker Name	+ Add column
Test	Taylor Root	09/05/2024	New				

A notification email will be sent to the Columbia Bank Digital Branch, and they will update their applicable fields and the status accordingly.

The Digital Branch Banker will do their best to get the account completed and funded ASAP, but ultimately it is the Provider’s responsibility to follow up with the Saver to fund their account.

The Digital Branch will begin processing new IDA/MISA Account Requests within 4 business hours. They will update the status and notes on the SharePoint item accordingly. Providers should refer to the status and notes for updates.

If you have questions regarding your IDA/MISA Account Request, please reach out to your designated Relationship Manager.

- **Oregon IDA Providers:** Contact Cachet Roberts at [CachetRoberts@ColumbiaBank.com](mailto:CachetRoberts@ColumbiaBank.com) or call 541-440-7565.
- **Washington IDA/MISA Providers:** Contact Deanna Yraguen at [DeannaYraguen@ColumbiaBank.com](mailto:DeannaYraguen@ColumbiaBank.com) or call 503-906-4438.

If your Relationship Manager is out of the office, please email [DigitalBranchBusinessRM@ColumbiaBank.com](mailto:DigitalBranchBusinessRM@ColumbiaBank.com) for assistance during their absence.