



Group onboarding center

A digital solution to onboard your group benefits cases



Your role is critically important. And our goal is to make doing business more efficient. That's why we're offering the group onboarding center from Principal®—a digital solution that streamlines the implementation process for group benefits cases.

What are the benefits?

- **More efficient, streamlined process.** You enter information directly into the system, so there's less chance of mistakes and back and forth with Principal—leading to faster case installation. And you'll only be required to enter the data needed based on sold case information.
- **Little to no paperwork.** The online process virtually eliminates paper forms and eSignature is used for employer and broker signatures—including the employer application.
- **Readily available status updates.** You can digitally track your cases from start to finish.
- **Use the same login credentials.** Access the group onboarding center through your normal login process.

How does it work?



Broker receives an email when a new case is ready to be onboarded.*



Email directs broker to the group onboarding center (Principal financial professional login required).



Broker enters data typically gathered for onboarding into 5 sections - employer, coverage, billing, agent, and enrollment.



Case is reviewed and implemented by Principal.



Application and additional forms sent to employer for eSignature. Application then goes to broker for countersignature.



Broker submits case to Principal when all sections are complete.

Need a financial professional login for the Principal website?

Simply follow these easy steps to get access:

1. Go to **principal.com/create-account**
2. Select **Financial Professional**
3. Click on **Contact Us** to access the form to request a login
4. In the 'Choose a topic' box of the form, select **Login information or issue**

You should receive an activation email in 1 -2 days that will guide you through setting up your login.



Contact your Principal sales representative for more information.



[principal.com](https://www.principal.com)

* This process cannot currently be used for the following cases: 500+ employees, self-accounting, self-funded, Paid-Family and Medical Leave (PFML), and rating tool.

Insurance products issued by Principal Life Insurance Company®, a member of the Principal Financial Group®, Des Moines, IA 50392.

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