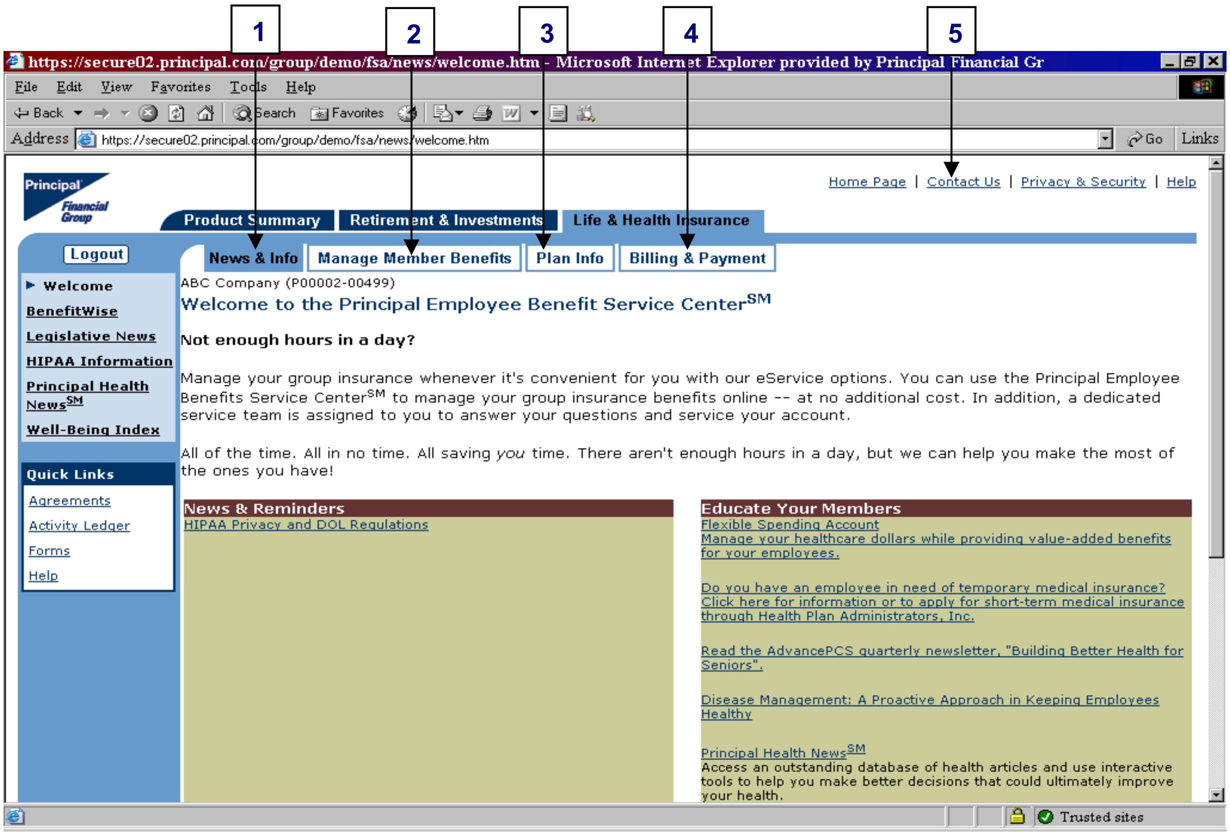
The Principal Financial Group®

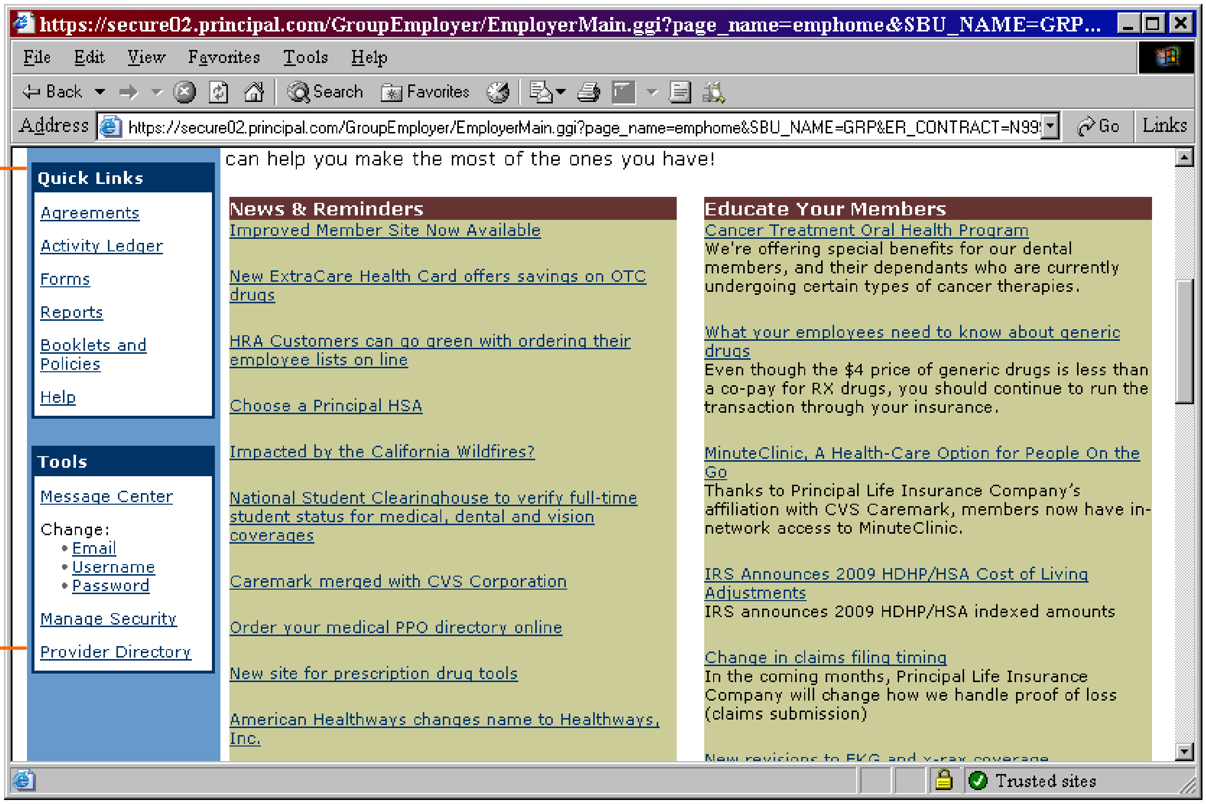
Principal.com Instructions

Tab Overview



TAB	DESCRIPTION
1. News and Info	This is the first screen you see when you log on. It includes important notices about your coverage and information you can share with your employees.
2. Manage Member Benefits	• View a list of members. • Add a new employee. • Add, change or terminate coverage for existing employees. • Order ID cards. • Update multiple salaries. • Access the Activity Ledger.
3. Plan Info	• Access an overview of your company's policy. • Access an overview of your employee benefits. • Access your benefit books online, if you have signed the online booklet agreement.
4. Billing and Payment	• Break down your bill to see the cost per employee. • Print a copy of your current bill. • View past statements.
5. Contact Us	View contact information for your: • Account administrator • Claims and benefit information • Local agent

Most commonly used links



LINKS	DESCRIPTION
Activity Ledger	Track all completed member changes.
Forms	View, print and order forms for you and your employees.
Reports	Run reports for disability or life claims that have been submitted by employees.
Booklets and Policies	Access paperless booklets online, if the booklet agreement has been signed.
Help*	Ask questions, find useful tips and access an online glossary of benefit terms.
Message Center*	Check regularly for important information about your employees' coverage.
Manage Security	Add additional users who will have their own username and password. If Manage Security questions, please call 1-800-621-6280.

*If your account number begins with a "1," this feature is currently unavailable.

Step-by-step instructions for frequently used functions

Address change
- Select the **Manage Member Benefits** tab.
- Enter the employee's ID number or Social Security number and click **Update**, or click the **employee's name** from the list.
- Under the dark blue "Update" bar, click **Address.**
- Enter the required information.

Benefit booklet, view or print
- Select the **Plan Info** tab.
- Click **Booklets and Policies** link on the left.
- Click the **booklet** you want to view/print.

Billing statements
- Select the **Billing and Payment** tab.
- Under "Current Billing Information," click **View Summary**.
- View **Detailed Statement**.

Enrolling an employee
- Select the **Manage Member Benefits** tab.
- Enter the employee's Social Security number and click **Add.**
- Enter required information.

Enrolling a dependent
- Select the **Manage Member Benefits** tab.
- Enter the employee's ID number or Social Security number and click **Update**, or click the specific **employee's name** from the list.
- Under the dark blue "Add" bar, click **Member/Dependent Coverage.**
- Enter the required information.

Forms
- Click **Forms** on the left side of any screen.
- Once the list of forms is displayed, click **View** for the form you want to view/print.

ID cards – order or print, if applicable
- Select the **Manage Member Benefits** tab.
- Click **Order ID Card** on the left.
- Enter the employee's ID number or Social Security number.
- Select the appropriate option and click **Submit** to order or click **Printable Version** to print.

Message center*
- Select the **News and Info** tab.
- In the **Tools** menu at the bottom left of the page, click **Message Center** to read important messages about your employees' coverage.

Name change
- Select the **Manage Member Benefits** tab.
- Enter the employee's ID number or Social Security number and click **Update** button, or select the **employee's name** from the list.
- Under the dark blue "Update" bar, click **Name (Member & Dependent).**
- Enter the required information.

Salary change (one member)*

- Select the **Manage Member Benefits** tab.
- Enter the employee's ID number or Social Security number and click **Update**, or click the **employee's name** from the list.
- Under the dark blue "Update" bar, click **Salary.**
- Enter the required information.

Salary change (multiple members)

- Select the **Manage Member Benefits** tab.
- Click **Multiple Salary Update** on the left.
- Enter the required information.

Secondary benefits administrator

- Select the **News and Info** tab.
- In the "Tools" menu at the bottom left of the page, click **Manage Security.**
- Click **Create a New Secondary Administrator.**
- Enter the required information.

Status of a transaction

- Select the **Manage Member Benefits** tab.
- Click **Activity Ledger** on the left.

Terminating coverage for an employee who is no longer employed or is ineligible

- Select the **Manage Member Benefits** tab.
- Enter the employee's ID number or Social Security number and click **Update**, or select the **employee's name** from the list.
- Under the dark blue "Remove" bar, click on **Terminated/Ineligible Member.**
- Enter the required information.

Terminating coverage for an employee who is still employed

- Select the **Manage Member Benefits** tab.
- Enter the employee's ID number or Social Security number and click **Update**, or select the **employee's name** from the list.
- Under the dark blue "Remove" bar, click **Member/Dependent Coverage.**
- Enter the required information.

Terminating coverage for a dependent

- Select the **Manage Member Benefits** tab.
- Enter the employee's ID number or Social Security number and click **Update**, or select the **employee's name** from the list.
- Under the dark blue "Remove" bar, click **Member/Dependent Coverage.**
- Enter the required information.

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WE'LL GIVE YOU AN EDGE®

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