



## **New group onboarding center experience coming in 2022**

We're excited to let you know about the **new group onboarding center**—an online tool through the Principal® website that will be used to complete the implementation process for group benefits cases. You'll hear more about using

this tool in the first quarter of 2022, but here are a few of the benefits you can expect:

- **More efficient, streamlined process.** You or someone on your team enters information directly into the system, so there's less chance of mistakes and less back and forth with Principal—leading to faster case installation.
- **Little to no paperwork.** The online process virtually eliminates paper forms and eSignature is used for employer and broker signatures.
- **Readily available status updates.** You can easily see the case status online through each step of the process.

**Take action now.** To make sure you're ready to use the group onboarding center, check now to see if you have a financial professional login to access the Principal website. If you—or anyone who may be working on installations—need to set up an account, simply follow [these steps](#).

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## Enrollment and case submission tips to wrap up Q4

The end of the year will be here before we know it. Here are some tips to help you wrap up Q4.

- **Encourage clients to use one of the solutions** from [principal.com/managebenefitsonline](https://principal.com/managebenefitsonline). It's convenient, cost-effective, and keeps all your clients' information in one place. With just a little advance planning, your clients can provide their employees with a comprehensive enrollment experience—making it easy to add additional coverages.
- **Be thorough for materials requests.** While online enrollment is the best practice, sometimes clients request printed materials. When that happens,

save time by answering all questions in the sold case email, including payroll frequency for cases with voluntary products.

- **Double-check the details.** Save time by checking for missing information (like signatures, salaries, and hire dates) before you submit a case. And make sure you're licensed in the state where you're selling that business.

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## Upcoming eService demos

We're hosting several upcoming demos where you and your clients can learn how to do the following:

- Manage member benefits
- Download, view, and pay bills
- Access benefit summaries and booklets/policies
- Access claim reports, tax reports, and frequently asked questions

Prepare for the demo by setting up your eService account if you haven't already—just follow the steps for [brokers](#) and [employers](#).

Join the demo (All three are 1:00 to 1:30 p.m. CT):

[Dec. 15, 2021](#) | [Jan. 19, 2022](#) | [Feb. 16, 2022](#)

## Recent news

- **Critical illness<sup>1</sup> (CI) infectious disease benefit available in NJ, and enhanced CI and accident health screening benefit<sup>2</sup> available in NJ and NY on Jan. 1, 2022. [See current state approvals](#)**

- **All products live on the online benefit enrollment site.** All Principal group benefits products are now available on the online benefit enrollment site through eService. The site allows new employees to elect benefits online—without the hassle, and wait, of using paper forms.

### Let's connect

Contact me if you're interested in learning more about the new group onboarding center.

Ryan Doyle

Sr Sales Rep-Grp Benefits

[doyle.ryan@principal.com](mailto:doyle.ryan@principal.com)

(973) 214-7186



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<sup>1</sup> Specified disease in NY.

<sup>2</sup> Health screening benefit for critical illness and the wellness benefit for accident have the same approval dates when offered for both products in that state.

CRITICAL ILLNESS (SPECIFIED DISEASE IN NY) AND ACCIDENT INSURANCE PROVIDE LIMITED BENEFITS.

Insurance issued by Principal Life Insurance Company, Des Moines, IA 50392.

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