

**Checklist for New Case Submission-Principal Financial Group
Medical**

Medical Cases must be submitted to our office by the 20th of the month prior to the effective date. Please check for missing information, such as social security numbers, elections, etc. It takes two weeks on average for underwriting to complete their review. After approval, it usually takes two weeks to receive ID cards, benefit booklets, PPO booklets and the administrative guide. These items are sent directly to the employer's address. Some items may be sent separately. If you wish to receive a copy for your records, please let us know.

Please send all items needed to the Principal Financial Group, Attn: Jennie Marquardt at W 10200 Innovation Dr. #400, Milwaukee, WI 53226

- Employer Application (GP47720-4)
- Advance Premium Check
- Wage & Tax Report (for employers with less than 51 full time ee's enrolling)
- Statement of Health Form (GP 45600-3)
- Combined Enrollment/Waiver forms (GP 41994-5) or Universal Application (GP50559-2) for SGR Employers (under 51 total employees)
- Prior Carrier Billing
- Small Employer Qualification (GP36164-6)
- Copy of proposal that was sold
- Need to know who the commissions are assigned to:
ENTER TAX ID # _____
- E Service Agreement (GP 49471-2)
- Copy of License (If you have not worked with Principal prior or within the last 6 months - Please note if you have not worked with Principal prior we will be forwarding additional forms needed)