

# How to add and terminate members in eService.

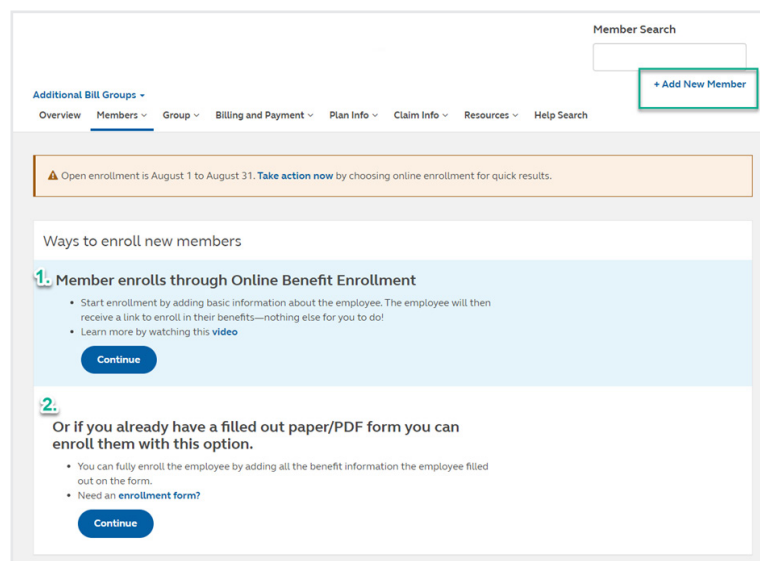
## Adding a new member

- In the upper right corner of any page, click on **Add New Member**.
- You'll see two options for enrolling a new member.

### › Option 1

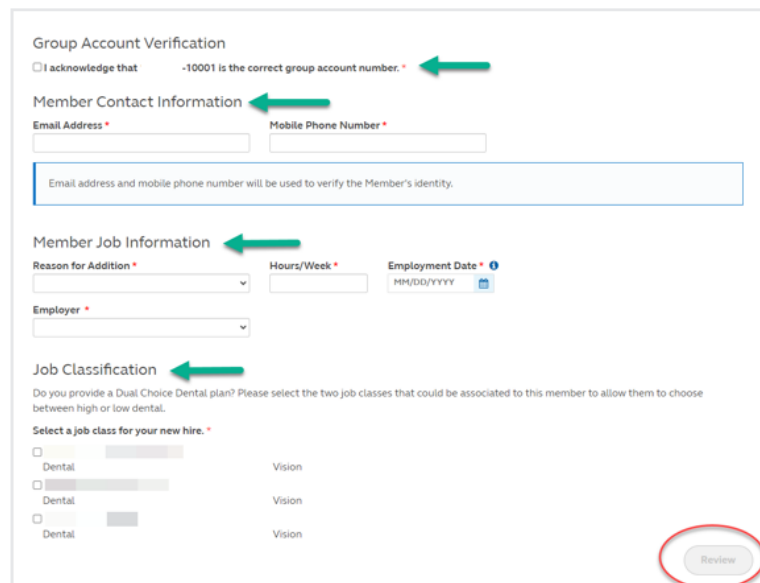
1. If you don't have an enrollment form for the member, click **Continue** within *Member enrolls through Online Benefit Enrollment*.
2. Acknowledge the correct group account number. Then, enter the employee's contact information, job information, and job classification (if applicable).
3. Review and submit. This will generate an email that is sent to the employee to elect their benefits.

**Note:** The employee needs to act on the link when received to enroll in their benefits. The employee's signature date will be based off the day they submit the form.



The screenshot shows the 'Add New Member' page. At the top right, there is a 'Member Search' box and a '+ Add New Member' button. Below the navigation menu, a warning banner states: 'Open enrollment is August 1 to August 31. Take action now by choosing online enrollment for quick results.' The main content area is titled 'Ways to enroll new members' and contains two options:

- 1. Member enrolls through Online Benefit Enrollment**
  - Start enrollment by adding basic information about the employee. The employee will then receive a link to enroll in their benefits—nothing else for you to do!
  - Learn more by watching this [video](#)
  - Continue**
- 2. Or if you already have a filled out paper/PDF form you can enroll them with this option.**
  - You can fully enroll the employee by adding all the benefit information the employee filled out on the form.
  - Need an [enrollment form?](#)
  - Continue**



The screenshot shows the 'Group Account Verification' and 'Member Contact Information' forms. The 'Group Account Verification' section includes a checkbox for 'I acknowledge that -10001 is the correct group account number.' The 'Member Contact Information' section includes fields for 'Email Address' and 'Mobile Phone Number'. Below this is a note: 'Email address and mobile phone number will be used to verify the Member's identity.' The 'Member Job Information' section includes dropdowns for 'Reason for Addition', 'Employer', and 'Hours/Week', and a date picker for 'Employment Date'. The 'Job Classification' section asks 'Do you provide a Dual Choice Dental plan?' and provides a list of job classes with checkboxes for 'Dental' and 'Vision'. A 'Review' button is circled in red at the bottom right.

## › Option 2

1. Already have a paper enrollment form?  
Click Continue within the second option on the *Add New Member* screen.

Additional Bill Groups -  
Overview Members Group Billing and Payment Plan Info Claim Info Resources Help Search

Member Search  
+ Add New Member

⚠️ Open enrollment is August 1 to August 31. **Take action now** by choosing online enrollment for quick results.

Ways to enroll new members

**1.** Member enrolls through Online Benefit Enrollment

- Start enrollment by adding basic information about the employee. The employee will then receive a link to enroll in their benefits—nothing else for you to do!
- Learn more by watching this [video](#)

Continue

**2.** Or if you already have a filled out paper/PDF form you can enroll them with this option.

- You can fully enroll the employee by adding all the benefit information the employee filled out on the form.
- Need an [enrollment form](#)?

Continue

2. Select the Reason for Addition and enter the hours the employee works per week.


Reason For Addition

Reason for Addition \* Hours/Week \*  
New Hire 40

I acknowledge that -10001 is the correct group account number.

Next

3. Enter the member demographic, employment, and family information.

 For signature date, use the date the member signed the enrollment form.

**TIP:** A timely signature date is within 31 days of the date the employee was eligible to enroll in benefits.

New Member Demographics

First Name \* Middle Name Last Name \*  
Please enter a first name

DOB \* Gender \*  
MM/DD/YYYY

Phone Number Email

Address Line 1 \*  
Address Line 2

City \* ZIP \* State \*

Employment Information

Employment Date \* Signature Date \*  
MM/DD/YYYY MM/DD/YYYY

Employers \* Job Classification \*  
Bill Group \*

Family Information

Need to add a dependent coverage or family member? Tell us. + Add a Dependent

4. “Check” the box next to the new member coverages the member has elected. Then, review and submit.

Please note, submission does not guarantee all benefits will be approved. Some coverages may require additional review and proof of good health.

New Member Coverages

If you cannot find the coverage(s) you are looking for, you may need to change the Job Classification as there may be different coverages per classification.

Dental  
 Vision

\* In the past 12 months, has the member (and/or dependents) had continuous Group Orthodontia with a prior carrier?  Yes  No

I don't know

\* Does this person have a spouse working for your company?  Yes  No

Family Information

Need to add a dependent coverage or family member? Tell us. + Add a Dependent

Review

## Terminating a member

1. In the upper right corner of any page, click on the **Member Search** box and start typing the employee's name. The member's full name will begin to populate in a drop down. Click on their name and hit **Enter**.

2. On the member's page, you'll see *Member Actions* options on the right side of the screen. Click on **Terminate Member**.

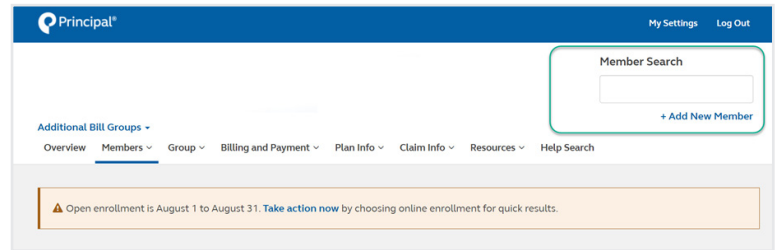
3. Enter the following fields:

A. Reason for termination.

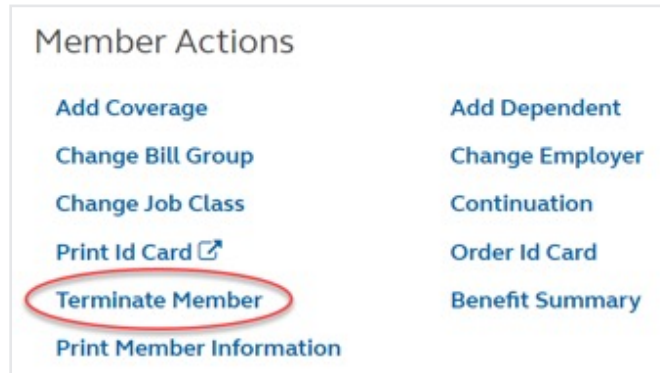
B. Last day worked - the system will calculate the benefit termination date based on policy provisions.

C. Whether or not the member has elected continuation coverage.

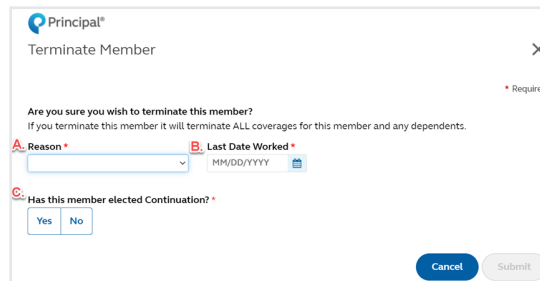
4. Click **Submit**.



The screenshot shows the Principal member search interface. At the top right, there are links for "My Settings" and "Log Out". Below these is a "Member Search" box with a search input field and a "+ Add New Member" button. A navigation menu includes "Additional Bill Groups", "Overview", "Members", "Group", "Billing and Payment", "Plan Info", "Claim Info", "Resources", and "Help Search". A warning banner at the bottom states: "Open enrollment is August 1 to August 31. Take action now by choosing online enrollment for quick results."



The screenshot shows the "Member Actions" menu. The "Terminate Member" option is circled in red. Other options include "Add Coverage", "Add Dependent", "Change Bill Group", "Change Employer", "Change Job Class", "Continuation", "Print Id Card", "Order Id Card", and "Benefit Summary".



The screenshot shows the "Terminate Member" confirmation dialog. It asks "Are you sure you wish to terminate this member?" and notes that terminating will end all coverages. There are three required fields: "Reason" (a dropdown menu), "Last Date Worked" (a date field with a calendar icon), and "Has this member elected Continuation?" (radio buttons for "Yes" and "No"). "Cancel" and "Submit" buttons are at the bottom right.

 Have questions?

**Brokers** – Contact the Advisor Web Support Team at 800-554-3395 or [advisorwebsupport@principal.com](mailto:advisorwebsupport@principal.com).

**Employers** – Call 800-843-1731.



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

Principal®, Principal Financial Group®, and Principal and the logomark design are registered trademarks of Principal Financial Services, Inc., a Principal Financial Group company, in the United States and are trademarks and service marks of Principal Financial Services, Inc., in various countries around the world.

GP63137 | 08/2023 | 3062027-082023 | © 2023 Principal Financial Services, Inc.