

Principal E-Application Set-Up

1

Select "Disability E-app" from the New Business section of the Principal website.

The screenshot shows the Principal website's navigation menu. Under the 'New Business' dropdown, the 'Disability E-App' option is highlighted with a red circle. Other options in the menu include 'Get Started', 'Submit Business', 'Policy Delivery', 'Implementation & Enrollment', 'Administrative Capabilities', 'Track Your Business', and 'Investments, Rates & Performance'.

2

Select "My Preferences".

The screenshot shows the 'My Preferences' section of the Principal website. The 'My Preferences' button is highlighted with a red circle. Other buttons include 'New Application', 'All Applications', and 'Exit'. The 'Advantages' section lists several benefits of the e-application process.

3

Enter your name and email address and complete the reviewers section with:

- Reviewer: Truluma
- Reviewer Email: Underwriting@truluma.com

The screenshot shows the 'My Preferences' form. The 'Reviewers' section is highlighted with a red circle. It includes fields for 'Reviewer Full Name' (Truluma) and 'Reviewer Email Address' (underwriting@truluma.com). Other fields include 'Default Product Type' (Disability Income), 'Default Time Zone' (EST - Eastern Standard Time), 'Page Size for My App. List' (10), and checkboxes for 'Send Message Center Emails' and 'Use agent email for communication sent by my delegate'.

