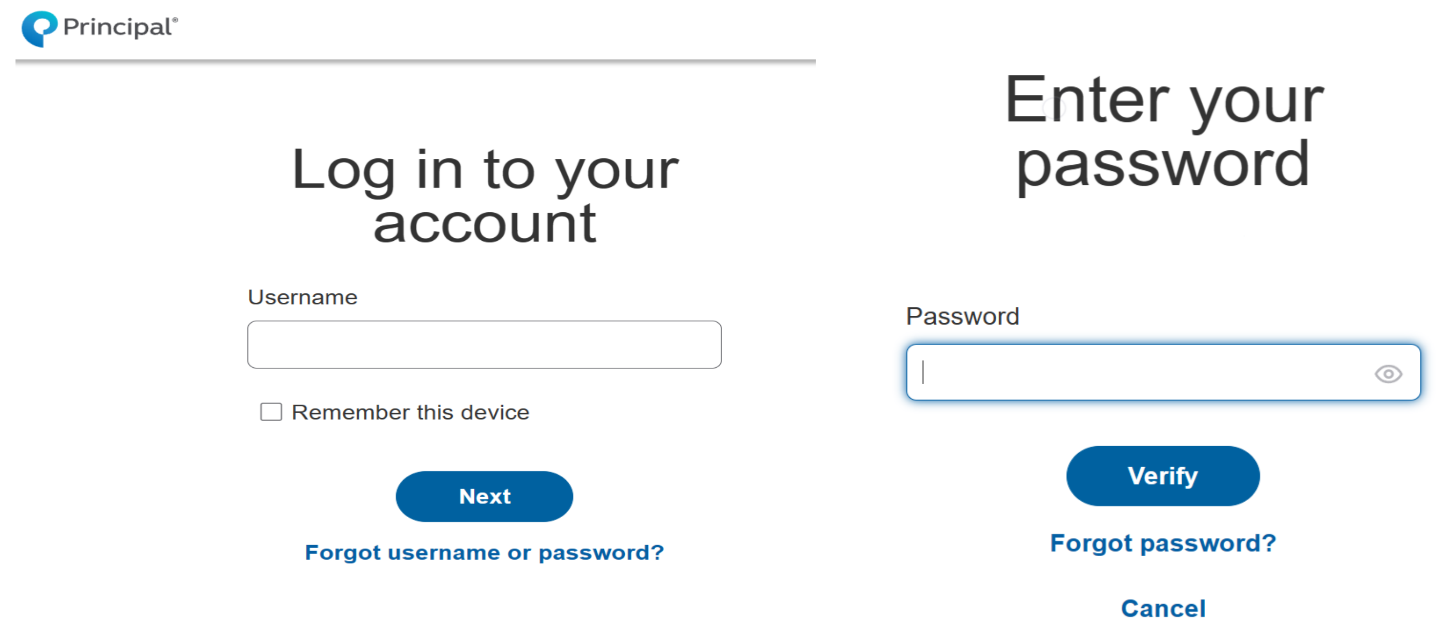
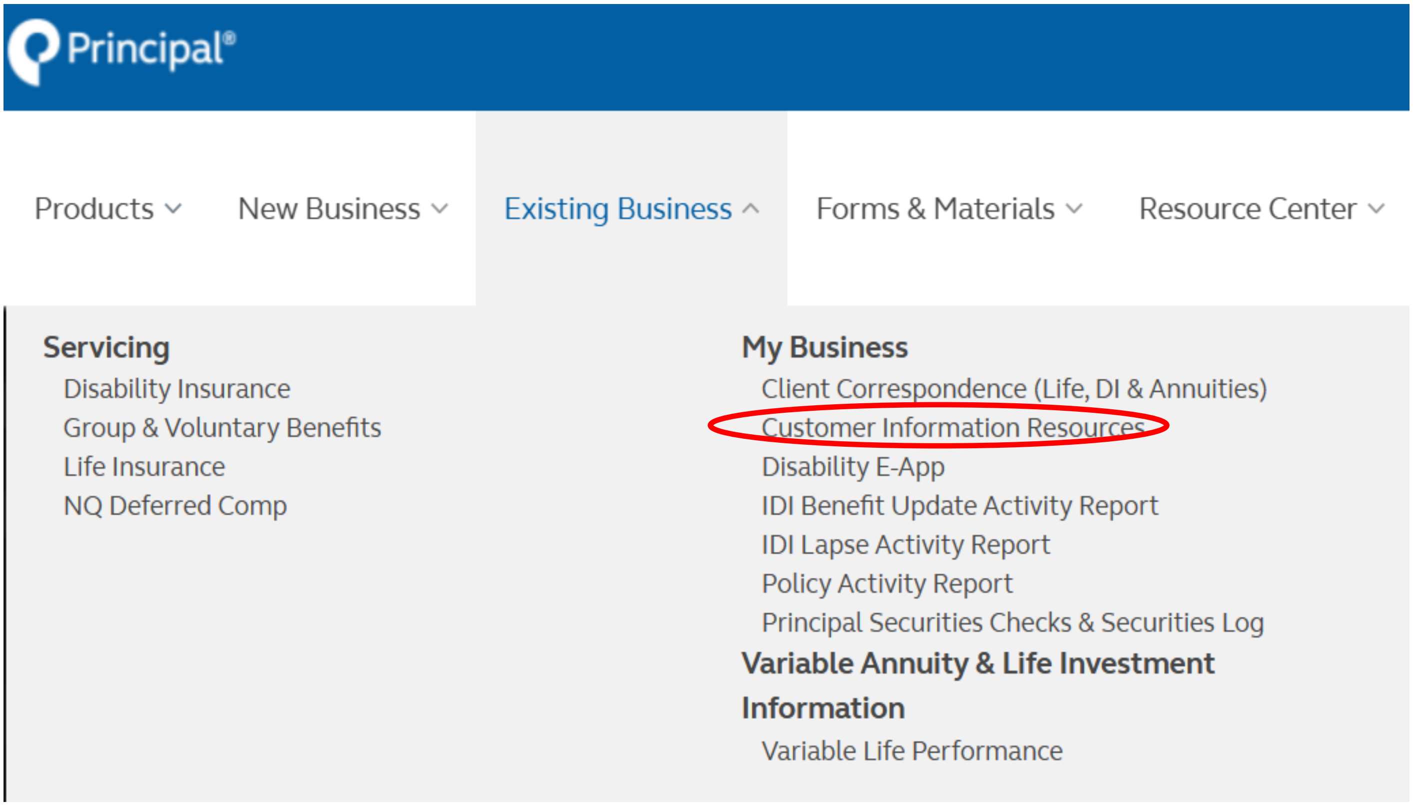
Principal - Access to Audit Report

- Login: **https://login.principal.com/login**

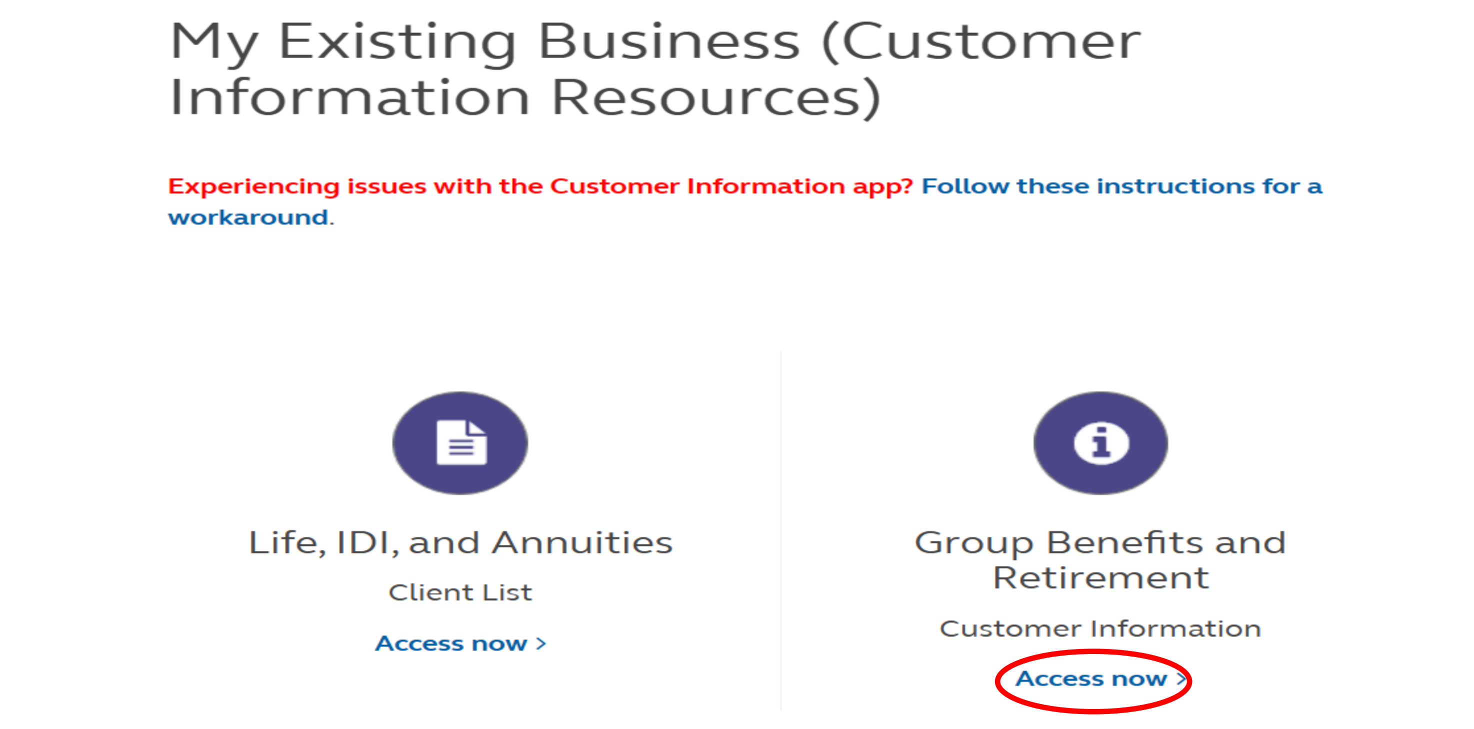
  Enter your Username, select "**Next**" and enter your Password and select "**Verify**"



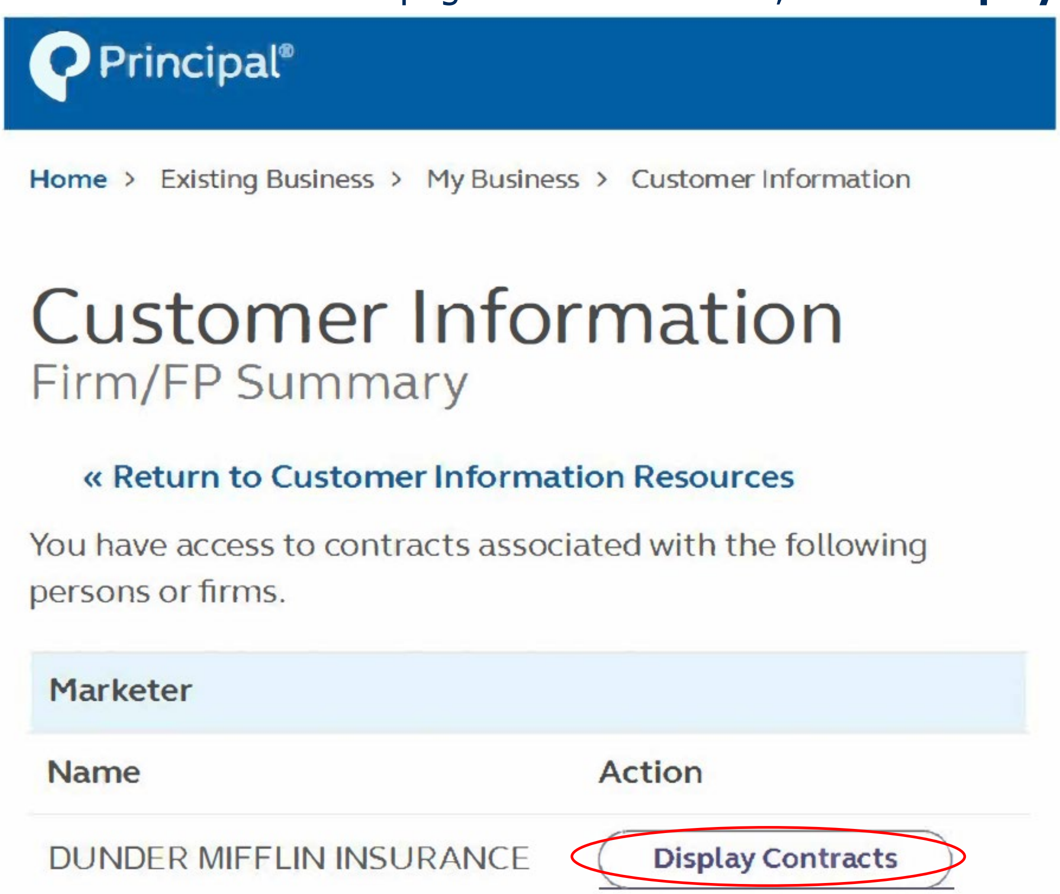
- On the top of the page, select drop down "Existing Business" and select "**Customer Information Resource**"



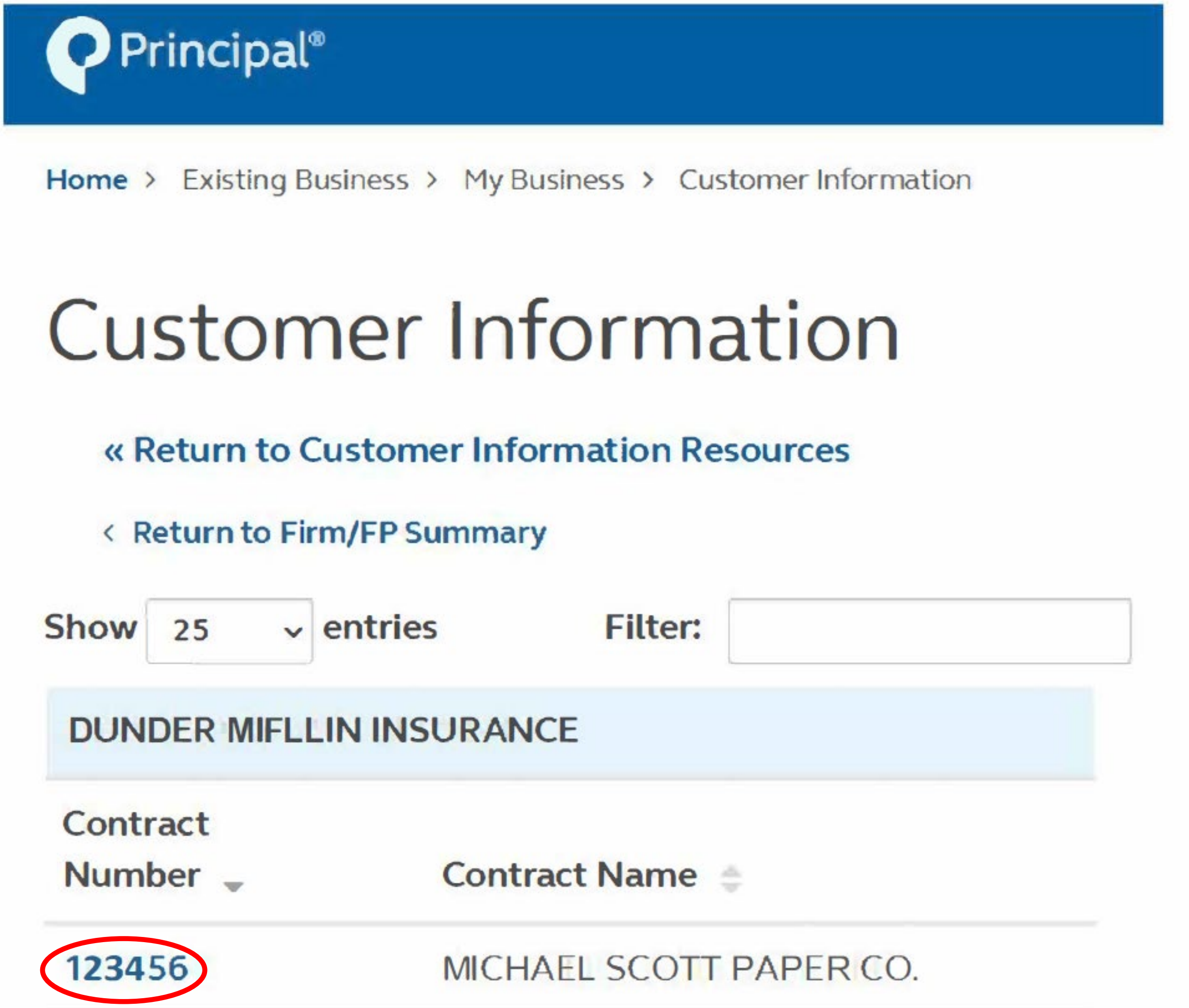
- Under Group Benefits and Retirement, Select “**Access Now**”



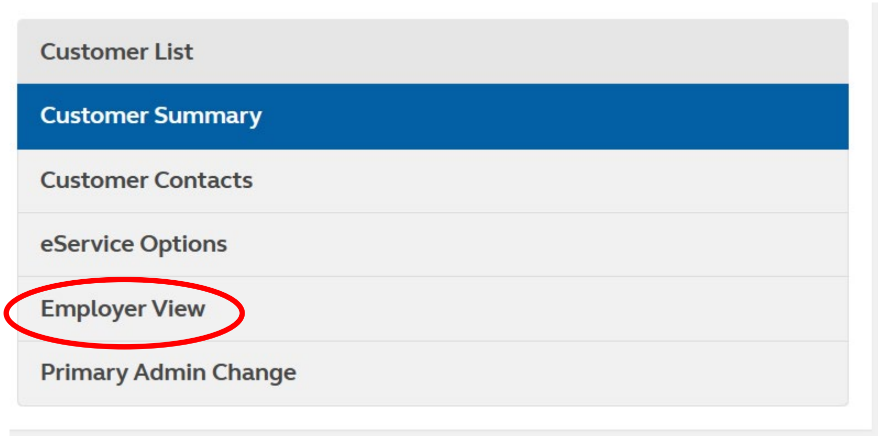
- Under Customer Information page and below Action, select “**Display Contracts**”



- Your Customer Information page and list of clients will appear. Find the client you want to audit and under "**Contract Number**" select the hyperlink of the policy number.



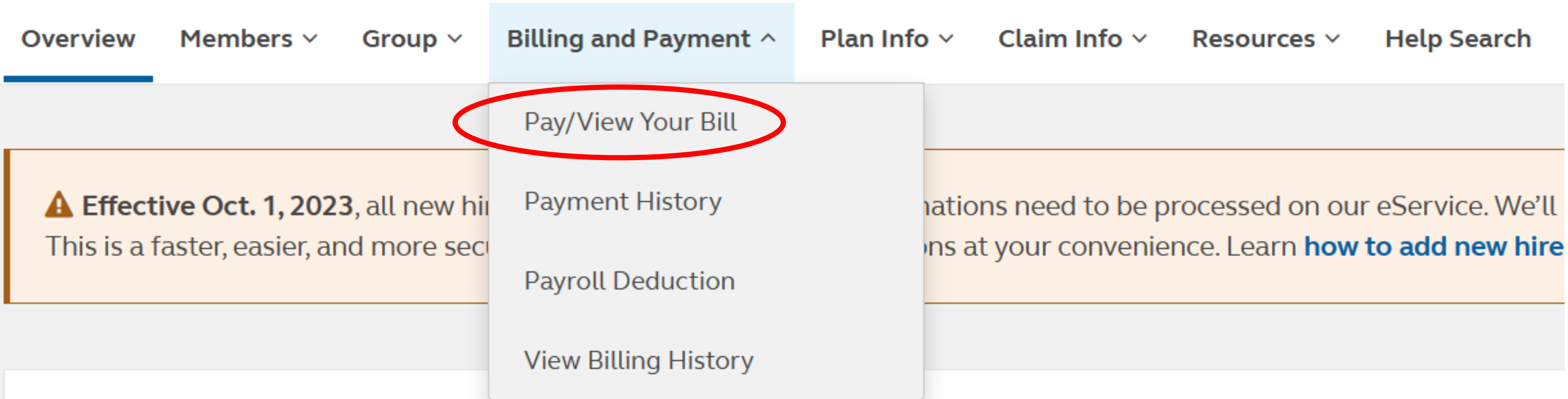
- Once the Customer Summary page appears on the very left, select "**Employer View**"



Coverage Wizard

Principal - Access to Audit Report

- Once in the Employer section of your client, select the dropdown "**Billing and Payments**" and then "**Pay/View Your Bill**"



- Under Billing and Payments, select "**Download Excel**". Open the file that states, "**GroupBillingStatement** and downloaded. Upload the .CSV file to Coverage Wizard!