Step-by-Step Instructions for Ordering a Participant Data Report

1. Log in to your account on principal.com using your employer/account administrator's credentials.
2. Click the "Reports" tab
3. Within the Reports page, select the "Employees" category
4. Find and choose the "Participant Data Report" and click "Available Now"
5. Set report parameters
    - In the setup window, select the following columns:
        - Plan Data (e.g., Location)
        - Plan Identifiers (Last, First, Middle name – defaults)
        - Basic Info (Current age, Date of birth, Gender)
        - Contact Information (Work email address and Valid work email address)
        - Work History (Current participant status, hire date, Plan entry, Rehire date, Termination dates)
6. Preview your selection by clicking "Update preview"
7. Click "Order Report" and accept or rename the default filename, and then click "Order."

    Note: the page will reset your screen to the top of the box, you will see a green bar which contains a hotlink to the Report history page where you can review your report in minutes.

8. Retrieve your report - You can obtain all custom reports by clicking on the Reports tab
    - On the upper right-hand side of the webpage, you will see a box called Report History and you can click on View history
    - Your report will be available as indicated by the report name in blue hyperlink. Once available, click on the name (hyperlink) to download your report.

Tips & Considerations

- Make sure all W-2 employees including those not participating and terminated employees who received any compensation for the year are listed.
- Data integrity: Verify that birth dates, hire dates, and termination dates are complete and accurate.
- Frequency: Repeat periodically (e.g., quarterly or at least each December) to catch and correct any missing or inaccurate employee data.