Running a Participant Data Report

As a reminder, all W-2 employees must be entered into the Principal Plan Administrator portal on their date of hire. To ensure your employee data is correct in Principal, you may want to periodically run a Participant Data Report.

Instructions to obtain this report with the pertinent information to ensure your plan is running smoothly is as follows:

1. Login into Principal
2. Click on the Reports tab.
3. Under Standard Reports, click on the Employees tab.
4. Look for a report called – Participant Data Report and click on Available Now.
5. In the set the parameters for your report box we recommend the Selection of the following columns:
    - Plan Data please select the following.
        - Location
    - Plan Identifiers please leave the default box checked for Last, first, middle name.
    - Basic information please select the following.
        - Current age
        - Date of birth
    - Work history – select the following.
        - Current participant status
        - Plan entry date
        - Hire date
        - Rehire date
        - Termination dates
6. Click the Update preview button (Note: you will see a preview of the report on screen)
7. Click on the Order Report button, a box will pop up with a default name (or you can rename your report) and click on the Order button.
8. When you click on the Order button, the system will reset your screen to the top of the box, you will see a green box. In the green box click on the link that says Report history.
    a. Note – if you don't go to Report history promptly you can get there by clicking on the Reports Tab and then on the upper right-hand side of the webpage you will see a box called Report History and you can click on View history
9. Your report will be available within minutes as indicated by the report name in blue hyperlink. Once available, click on the name (hyperlink) to download your report.

Please note, you are responsible for the integrity of the information in Principal. Ensure that all W-2 employees have been entered into Principal's system and all terminated employees have a termination date listed.

As always, please contact us with any questions or concerns, at accebenefitsteam@acce.org.

NOTE: Additional fields you can review to assist with security and communications to the Participants include the following:

- Basic information please select the following.

    - Gender
- Contact information please select the following.
    - Work email address
    - Street Address
    - City
    - State
    - Zip code

As a reminder, these are the only additional fields you are responsible for maintaining as Plan Administrator. Any additional information provided to Principal such as marital status, phone numbers, personal emails, etc. are at the discretion of the Participant who can provide to Principal as they desire.