

Welcome to a new way of doing business



Allowing clients to apply for insurance in the way that works best for them has never been more important. And now you have an exciting new option. Your clients can complete Part B of their Individual Disability Insurance (IDI) applications online—when and from wherever they want.

What does this mean for you?

- **More flexibility and convenience for your clients.** They apply when it's convenient, without waiting on telephone calls or having face-to-face interactions.
- **Faster coverage.** Since clients enter Part B information themselves, it's generally more complete, reducing underwriting follow-up questions and additional requirements.
- **Always available.** You're not restricted by normal business hours. Request Part B allows you to initiate the process at any time, so you get your clients access to Part B with no delays.
- **A market differentiator.** Having this leading technology at your fingertips, you'll be able to offer your clients a solution that few others can.



Fast facts

- Approved in all states except CA, CT, DC, DE, FL, MT, NY, ND, and SD.
- Available for all Principal IDI products, including in combination with a life insurance application.
- No occupation class or issue limit restrictions.¹
- Applicants must have a valid email address.
- Client must speak and understand English.

¹ Normal guidelines apply.

Here's how it works

- 1 | You work with your client and prepare to **submit the disability insurance application**.
- 2 | Indicate **Online Part B on the Producer Report**.
- 3 | Next, **the producer or field office contact completes the [Part B Request Form online](#) or calls the TeleApp Contact Center to initiate the client email link** to complete Part B online.
- 4 | Once we receive the notification, our system will **automatically send the client an email with the online Part B link**.
 - Reminder emails are sent to clients at five and 10 days (field office contacts originally listed on the application/Part B Request Form will also receive copies of the reminder emails).
 - If the online Part B isn't completed within 30 days, the link will expire.
 - If the client originally requested a TeleApp phone interview but wasn't available to take the call, the TeleApp Contact Center will leave a message and email the client a link to complete the online Part B.
- 5 | The field office contact provided on the application will **receive an email with a copy of Part B** after it's completed and the rest of the application has been received. It's that easy!



The Principal TeleApp Contact Center is available to help answer questions you and your clients might have. Call us at 888-835-3277, main option 1, sub option 4.

TeleApp Contact Center hours:

Monday-Thursday, 7 a.m.-10 p.m. CT, Friday, 7 a.m.-7 p.m. CT.

Learn more at principal.com/OnlinePartB.

 **Let's connect** | Call the National Sales Desk at 800-654-4278.



advisors.principal.com

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