

My Plan Administration Account (My PAA) Import Software-Prepared Filing(s) into My PAA Editing Screens



Import Software-Prepared Filing(s) into My PAA Editing Screens

My PAA Login Page

- Enter your User ID into the field labeled “User ID” on the My PAA login page.
- Enter your Password into the field labeled “Password”.
- Select the button labeled “Login”.

My PAA Login

Welcome to My Plan Administration Account (My PAA), where you can electronically submit pension plan premium filings and payments to PBGC.

What's New and How to Use My PAA

- [What's New for Practitioners](#): Premium filings for plan year 2015 may now be submitted.
- [What's New in My PAA](#)
- [Password Rules](#)
- [More about My PAA](#): e-filing options, payment options, FAQs, Tips, Users Manual, etc.

➔ **User ID:**

➔ **Password:** (Case Sensitive)

➔ **Login**

[✎ Forgot your User ID?](#) [✎ Forgot your Password?](#)

[✎ New users click here to sign up.](#)

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Import Software-Prepared Filing(s) into My PAA Editing Screens

Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the “Import a Filing” link in the Returning User section.
 - ❖ The Import Software-Prepared Filing(s) Page will be displayed (Slide 4).
- If the Home Page is displayed, go to the slide 3.

Note: The Launch Page is intended to help you initiate the premium related tasks. If you prefer not to see this page when you login, check the “Do not show this page at login” box and select “Close”.

My PAA (My Plan Administration Account) Launch Page Testing!

What do you want to do in My PAA (PBGC's premium e-filing application)?

Select the link(s) below to go to the section of the screens to initiate the tasks shown.

New Users:

- [Get Started](#)

Returning Users:

- [Review In-Process Filing\(s\)](#)
- [Create a Filing](#)
- [Import a Filing](#)
- [Upload a Filing](#)
- [Go to Home Page](#)
- [Go to a Plan's Page](#) (e.g., to review an account history)
- [Update or Deactivate My PAA Account](#)

Filing Coordinators:

- [Add a Plan](#)
- [Add a Practitioner](#)
- [Remove a Practitioner](#)
- [Change a Practitioner's Permissions](#)

Additional Resources:

- [Helpful Links](#)

Do not show this page at login

[Close](#)

Import Software-Prepared Filing(s) into My PAA Editing Screens

From the Home Page

- Select the “Import Filing(s)” button in the Import Software-Prepared Filing(s) section.
 - ❖ The Import Software-Prepared Filing(s) Page will be displayed (slide 4).

Note 1: To successfully import a filing, the plan must be in the “Plans in Your Account” section.

Note 2: The Menu Bar on the top of every My PAA screen can be used to easily access other pages, e.g., the Launch Page, and Help information.

The screenshot shows the PBGC My PAA Home Page. At the top, there is a navigation bar with links for LAUNCH PAGE, HOME, PLANS, FILINGS, and HELP. The user is logged in as Jack Black. The page is divided into several sections:

- Quick Links:** Add Plan, Create Filing, Import Filing, Upload Filing.
- Right Now:** 4 Filings Count (In-Process), 4 You Hold, 0 Others Hold, 6 Plans Count.
- In-Process Filings:** A table listing active filings with columns for Filing, Last Routed, Plan Name, EIN/PN, and Held By.
- Plans in Jack Black's Account:** A search bar and a table listing various retirement plans with columns for Plan Name, EIN/PN, and Actions (Create a Filing, Invite a Practitioner).
- Import Software-Prepared Filing(s):** A section with a description and a prominent blue button labeled "Import Filing(s)" with a right-pointing arrow, highlighted by a red arrow.
- Upload Software-Prepared Filing(s):** A section with a description and a table of uploaded filings with columns for File Name, Comments, Conf. ID/Receipt, Received, Filing Status, and Payment Status.

Import Software-Prepared Filing(s) into My PAA Editing Screens

From the Import Software-Prepared Filing(s) Page

- Select The “Browse” link to select the appropriate file to import.
- Select the “Import” button.
- The “Import Software-Prepared Filing Confirmation” page will be displayed (Slide 5).



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Import Software-Prepared Filing(s)

Select the electronic file you created with your private-sector software that contains one or more premium filings to be imported into the My PAA editing screens for routing, editing (if necessary), signature, and submission to PBGC. Please note that if the electronic file includes filing information for the EIN/PN and Plan Year of a filing currently in progress in the My PAA data entry and editing screens, including a filing that has been scheduled for a future submission, that filing will be overwritten with the one from the electronic file.

Note: The file must be in a PBGC-defined XML format.

[What does this mean?](#)

Select File: 2015 SE Filing.xml

Browse...

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Import Software-Prepared Filing(s) into My PAA Editing Screens

Import Software-Prepared Filing Confirmation Page

- This is the confirmation that the filing(s) have been successfully imported into the My PAA editing screens.
- Review this page and select the “Go to My PAA Home Page” button to view the imported filing (Slide 6).



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Import Software-Prepared Filing

You have successfully imported an electronic file that contains premium filing information for one or more plans in your account. Select the "Go to My PAA Home Page" button. The filing(s) you imported will be listed on that page in your "In-process Filings" section. From there, you can open a filing to edit it (if necessary), route it to another person on your "filing team," or provide the necessary signatures for submission to PBGC.

[Go to My PAA Home Page](#)

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Import Software-Prepared Filing(s) into My PAA Editing Screens

Home Page

- The imported filing is displayed in the In-Process Filings section.
- Select the appropriate imported filing in the “Filing” column of the In-Process Filings section to continue the filing process.
- ❖ The “Filing Manager” page will be displayed (Slide 8).
- If necessary, select the “View all In-Process Filings” link to see all of your in-process filings (See Slide 7).

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Welcome, Jack Black!

LAUNCH PAGE HOME PLANS FILINGS HELP My Account Logout

Home Page

Quick Links

- Add Plan
- Create Filing
- Import Filing
- Upload Filing

Right Now

- 4 Filings Count (In-Process)
- 4 You Hold
- 0 Others Hold
- 6 Plans Count

In-Process Filings

View all In-Process Filings > Instructions Clear Sort

Filing	Last Routed	Plan Name	EIN/PN	Held By
2015 Comprehensive		My Retirement Pension Plan	88-8888888 / 750	Jack Black
2015 Comprehensive	04/07/2015	Retirement Plan 4	55-6666666 / 777	Jack Black
2015 Comprehensive		Retirement Plan1	11-2222222 / 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-3333333 / 444	Jack Black

Plans in Jack Black's Account

View all Plans > Instructions

Plan Name / EIN Search Clear Search

Plan Name	EIN/PN	Actions
Pension Plan1	44-1111111 / 444	Create a Filing Invite a Practitioner
Retirement Plan 4	55-6666666 / 777	Create a Filing Invite a Practitioner
Retirement Plan1	11-2222222 / 123	Create a Filing Invite a Practitioner
Retirement Plan2	22-3333333 / 444	Create a Filing Invite a Practitioner
Retirement Plan3	44-5555555 / 777	Create a Filing Invite a Practitioner
Retirement Plan5	88-8888888 / 750	Create a Filing Invite a Practitioner

Import Software-Prepared Filing(s) into My PAA Editing Screens

All In-Process Filing(s) Page

- Select the appropriate imported filing in the “Filing” column of the In-Process Filings section.
 - ❖ The “Filing Manager” page will be displayed (Slide 8).

Note: You can sort the columns to find a particular filing.



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LAUNCH PAGE HOME PLANS ▾ FILINGS ▾ HELP My Account Logout

All In-Process Filing(s) [Instructions](#)

Held By Me Held By Others All Filings [Clear Sort](#)

Filing ▾	Last Routed ▾	Plan Name ▾	EIN/PN ▾	Held By ▾
2015 Comprehensive		My Retirement Pension Plan	88-8888888/ 750	Jack Black
2015 Comprehensive	04/07/2015	Retirement Plan 4	55-6666666/ 777	Jack Black
2015 Comprehensive		Retirement Plan1	11-2222222/ 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-3333333/ 444	Jack Black

Import Software-Prepared Filing(s) into My PAA Editing Screens

Filing Manager Page

- Use the Filing Manager page to review, edit, sign, pay and submit the filing. See the demo “Review, Edit, Sign, and Route a filing”.
- Select the appropriate link/button to logout of My PAA or go to another page (e.g., the Plan Page).

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LAUNCH PAGE HOME PLANS FILINGS HELP
My Account Logout

Step 2: Edit Draft, Sign Filing, and Select Payment Alternative
 Comprehensive Filing for Plan Year Commencing 1/1/2015
 Retirement Plan5 – 88-8888888 / 750

Filing Manager

This Filing Has **NOT** Been Submitted [Go to Plan Page](#)

Filing Status

Filing is: **not ready for submission** (refer to 'To submit this filing' below)
 You are holding the filing

Filing Task List :- Instructions

View/Edit Filing	✓	This filing contains all the required information; however, a complete filing does not necessarily indicate that there are no errors. To review warning messages related to common mistakes, click the View button.	Delete Filing
Sign		Sign as Plan Administrator or PA Representative	
Sign		Sign as Actuary	
Authorize		Authorize as Paying Agent	

To take action on this filing:

- You must be holding the filing (otherwise, only "View Filing" is available). Tasks listed reflect your permissions for this plan. Permissions are listed in the Filing Team section below.
- Note: If a change is made that affects the amount due or variable-rate premium information, any signatures/authorizations will be removed. The filing will need to be re-signed/authorized.

To submit this filing

- You must be holding the filing and must have the Plan Administrator, PA Representative or Filing Coordinator permission.
- The task list must indicate that the filing contains all required information.
- Each required signature/authorization on the task list must be completed.

Filing Team :- Instructions

The filing coordinator can change permissions from the [plan page](#)

Name	Permissions	Phone	E-mail
Jack Black	Plan Administrator, View Account History, Actuary, Preparer, Paying Agent, Filing Coordinator	123-123-1234	jblack@workemail.com Holding

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