

# **My Plan Administration Account (My PAA) Review Account History for a Plan (Active Plans vs. Archived Plans)**



Pension Benefit Guaranty Corporation  
Protecting America's Pensions

# Review Account History for a Plan (Active Plans vs. Archived Plans)

## My PAA Login Page

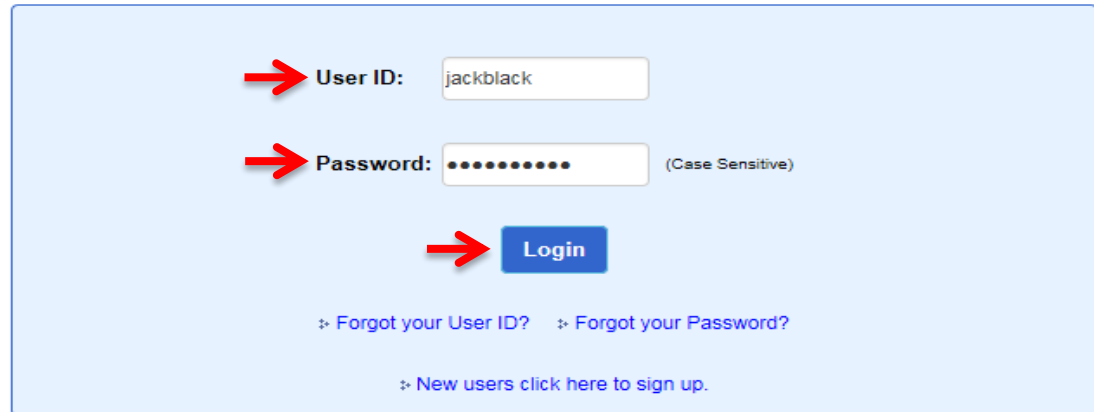
- Enter your User ID into the field labeled “User ID” on the My PAA login page.
- Enter your Password into the field labeled “Password”.
- Select the button labeled “Login”.

## 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.



The screenshot shows the My PAA Login page. It features a light blue background with a white border. At the top, there is a header bar with the text "My PAA Login". Below the header, there is a welcome message: "Welcome to My Plan Administration Account (My PAA), where you can electronically submit pension plan premium filings and payments to PBGC." This is followed by a section titled "What's New and How to Use My PAA" with a list of links: "What's New for Practitioners", "What's New in My PAA", "Password Rules", and "More about My PAA". The main login area is a white box with a light blue border. It contains three input fields: "User ID:" with the text "jackblack", "Password:" with a masked password ".....", and a "Login" button. Red arrows point to each of these three elements. Below the login fields, there are two links: "Forgot your User ID?" and "Forgot your Password?". At the bottom of the login box, there is a link: "New users click here to sign up."

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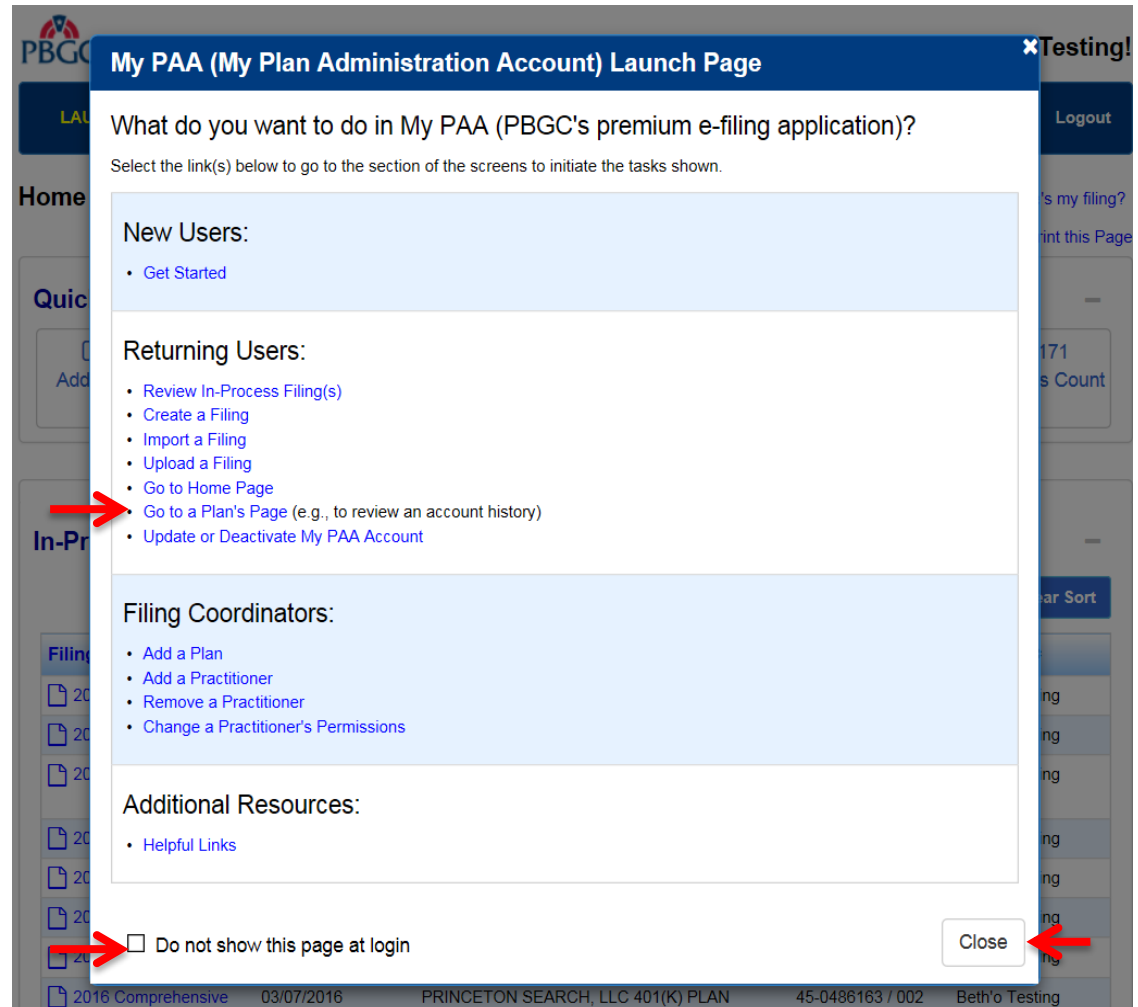
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# Review Account History for a Plan (Active Plans vs. Archived Plans)

## Launch Page

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

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”.



# Review Account History for a Plan (Active Plans vs. Archived Plans)

## From the All Plans in Your Account Page

- Select the appropriate plan in the “Plan Name” column.
- The “Plan Page” will be displayed (Slide 5).
- Plans are typically displayed in the Active Plans section.
- You have the option to move a plan to the Archived Plans section (e.g., if the plan is rarely used) by checking the box for the plan and clicking the “Move to Archived Plans” button.
- To return the plan to the Active Plans section, check the box for the plan and click the “Move to Active Plans” button.

**Note:** You can search and sort the columns to find a particular plan within both Active and Archived Plans section.

**LAUNCH PAGE** HOME PLANS ▾ FILINGS ▾ HELP My Account Logout

All Plans in Jack Black's Account [Instructions](#) [Print this page](#)

**Active Plans**

Plan Name / EIN Search Clear Search Move to Archived Plans

Plan Name ^	EIN/PN ⇅	Actions
Retirement Plan 1	10-4104104 / 001	Create a Filing Invite a Practitioner <input type="checkbox"/>
Retirement Plan 2	44-455222 / 001	Create a Filing Invite a Practitioner <input type="checkbox"/>
Retirement Plan 3	44-4777888 / 001	Create a Filing Invite a Practitioner <input type="checkbox"/>
Retirement Plan 4	11-9922110 / 567	Create a Filing Invite a Practitioner <input type="checkbox"/>

**Archived Plans**

Plan Name / EIN Search Clear Search Move to Active Plans

Plan Name ^	EIN/PN ⇅	Actions
Retirement Plan 5	10-2102102 / 001	Create a Filing Invite a Practitioner <input type="checkbox"/>
Retirement Plan 6	65-0425084 / 002	Create a Filing Invite a Practitioner <input type="checkbox"/>
Retirement Plan 7	10-3103103 / 001	Create a Filing Invite a Practitioner <input type="checkbox"/>
Retirement Plan 8	74-2980802 / 231	Create a Filing Invite a Practitioner <input type="checkbox"/>

# Review Account History for a Plan (Active Plans vs. Archived Plans)

## From the Home Page

- Select the appropriate plan name in the “Plan Name” column in the Plans in your Account section.
  - ❖ The “Plan Page” will be displayed (Slide 5).
- If necessary, select the “View all Plans” link to see all of your Plans (Slide 3).

Note 1: You can search and sort the columns to find a particular plan.

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, the PBGC logo and "My PAA" text are on the left, and "Welcome, Jack Black!" is on the right. Below this is a dark blue navigation bar with links: LAUNCH PAGE, HOME, PLANS (with a dropdown arrow), FILINGS (with a dropdown arrow), and HELP. On the right side of this bar are links for "My Account" and "Logout".

Below the navigation bar, the page is titled "Home Page". On the right side of this section are two links: "Where's my filing?" and "Print this Page".

The main content area is divided into two columns. The left column is titled "Quick Links" and contains four buttons: "Add Plan", "Create Filing", "Import Filing", and "Upload Filing". The right column is titled "Right Now" and contains four boxes with counts: "1 Filings Count (In-Process)", "1 You Hold", "0 Others Hold", and "8 Plans Count".

Below these columns is a section titled "In-Process Filings" with a link "View all In-Process Filings" and a plus icon for instructions.

The next section is titled "Plans in Jack Black's Account". It has a search bar labeled "Plan Name / EIN" and two buttons: "Search" and "Clear Search". To the right of the search bar is a link "View all Plans" with a red arrow pointing to it, and a plus icon for instructions.

Below the search bar is a table with the following data:

Plan Name ^	EIN/PN	Actions
Retirement Plan 1	10-4104104 / 001	Create a Filing, Invite a Practitioner
Retirement Plan 2	44-4555222 / 001	Create a Filing, Invite a Practitioner
Retirement Plan 3	44-4777888 / 001	Create a Filing, Invite a Practitioner
Retirement Plan 4	11-9922110 / 567	Create a Filing, Invite a Practitioner

A red arrow points to the "Retirement Plan 4" row.

Below the table is a section titled "Import Software-Prepared Filing(s)" with a plus icon for instructions.

The next section is titled "Upload Software-Prepared Filing(s)". It has a link "View all Uploads" and a plus icon for instructions. Below the link is a text box with instructions: "Submit fully-completed filing(s) for any plan(s) once you have at least one plan in your account. After the file is uploaded, click the link (if shown) under 'Conf.#/ Receipt' to view the receipt(s) showing data submitted for each filing. View this section's Instructions for details." To the right of the text box is a button "Upload Filing(s)".

Below the text box is a table with the following data:

File Name	Comments	Conf #/Receipt	Received	Filing Status	Payment Status
2015 SE Filing-2.xml	Yes	3743951	4/7/2015 10:30:20 AM	Completed	Not Applicable
2015 SE Filing-2.xml	Yes	3743949	4/7/2015 10:28:19 AM	Completed	Incomplete
2015 SE Filing-2.xml	Yes	3743947	4/7/2015 10:23:52 AM	Completed	Incomplete

# Review Account History for a Plan (Active Plans vs. Archived Plans)

## Plan Page

- Select the “Account History” link to continue to the Account History.
- Select the “About Account Histories” link to learn about the data on the Account Histories.

Note 1: You must have been given the “permission” to view the plan’s Account History. If you do not see the Account History link, ask the plan’s filing coordinator to add the “View Account History” permission to your account.

Note 2: If the plan is trustee, the Account History will not be displayed as described in the Account History section.

The screenshot displays the PBGC My PAA interface. At the top is a navigation bar with links: LAUNCH PAGE, HOME, PLANS, FILINGS, and HELP. On the right of the bar are links for My Account and Logout. Below the navigation bar, the page title is "Plan Page".

The main content area is divided into two columns. The left column is titled "Plan Information" and shows details for "Retirement Plan 4 - 11-9922110 / 567". It includes fields for Plan Sponsor, Plan Administrator, and Plan Contact. A note at the bottom states: "Note: The information displayed here is the most up-to-date information that PBGC has on record for this plan. For instructions on how to update this information (outside the premium filing process) call the PBGC Contact Center at 1-800-736-2444. TTY/TDD users may call the Federal relay service at 1-800-877-8339 and ask to be connected."

The right column is titled "Account History" and contains the section "Premium Filings and Payments Received by PBGC". It features a link for "Account History" (highlighted with a red arrow) and a link for "About Account Histories" (also highlighted with a red arrow). A message states: "There will be a delay between when the filing is submitted and when it shows in the Account History. Due to the delay, this Account History may not include your most recent filing."

Below the Account History section is the "Premium Filings for the Plan" section, which includes a "Create a Filing" button and radio buttons for "In-process", "Submitted", and "All filings" (selected). It contains a table of filings:

Filing	Confirmation #	Filing Method	Received Date	Status
2015 Comprehensive*	3962142	Screen Prepared	4/11/2016 3:56:19 PM	Submitted/Successfully Processed
2015 Comprehensive	3957124	Screen Prepared	3/7/2016 12:54:42 PM	Submitted/Deleted
2015 Comprehensive	3955569	Screen Prepared	2/23/2016 10:36:16 AM	Submitted/Deleted
2014 Comprehensive	3834489	Imported	10/14/2014 3:29:42 PM	Submitted/Successfully Processed
2013 Comprehensive*	3819310	Screen Prepared	9/24/2014 10:17:25 AM	Submitted/Successfully Processed
2013 Comprehensive	3788755	Screen Prepared	4/8/2014 11:30:07 AM	Submitted/Deleted
2008 Comprehensive	1322478		10/15/2008 4:25:01 PM	Submitted
2007 Form1scheda	880141		11/1/2007 6:04:19 PM	Submitted

Below the Premium Filings section is the "Premium Filing Practitioners for the Plan" section, which includes a link to "Invite a Practitioner" and a table of practitioners:

Edit	Name	Permissions	Phone	Email	Remove Practitioner
	Sue Practitioner	Plan Administrator, Paying Agent, Preparer	202-326-4000	SPRACITIONER@WORKEMAIL.COM	
	Jonny Doe	Preparer, Paying Agent	313-313-3333	JONNYDOE@WORKEMAIL.COM	
	Jack Black	Actuary, View Account History, Filing Coordinator, Paying Agent, Plan Administrator, Preparer	123-123-1234	JBLACK@WORKEMAIL.COM	

At the bottom of the page, there is a footer with links: PBGC.gov | Privacy Act Notice | Paperwork Reduction Act Notice | Contact Us | About Online Premium Filing.

# Review Account History for a Plan (Active Plans vs. Archived Plans)

## Account History Information Page

- Review the instructions on this page.
- Select the “Continue” button to display the Account History.
- Select the “Return” button to go back to the Plan Page (Slide 5).



[LAUNCH PAGE](#) [HOME](#) [PLANS ▾](#) [FILINGS ▾](#) [HELP](#)

The on-line Account History is intended only for your review and verification. Please consider the following when reviewing the Account History:

- There will be a delay between when the filing is submitted and when it shows on the Account History, the length of which can vary (e.g., periodic updates to our systems can result in longer delays). To determine whether there are any ongoing delays, see the FAQ "How do I know a premium filing was received by PBGC?" (on the Online Premium Filing (My PAA) page of our Web site [www.pbgc.gov](http://www.pbgc.gov)).
- If an amount owed is present, please contact us to get payment details and, if applicable, an updated amount owed (due to the time delays involved).
- If there is any questionable data, for example, any unexpected payments or overpayments reflected on the Account History, please contact us for further analysis.

To reach the Practitioner Contact Center, please call toll-free 1-800-736-2444 (and select the "premium payment" option). Note: TTY/TDD users may call the Federal relay service toll-free at 1-800-877-8339 and ask to be connected. You may also e-mail your questions to [premiums@pbgc.gov](mailto:premiums@pbgc.gov).

For more information about what an Account History is, please click the "About Account Histories" button on the Plan Page.

Selecting the "Return" button will return you to the Plan page.

Selecting the "Continue" button will display the Account History.

[Return](#) [Continue](#)

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# Review Account History for a Plan (Active Plans vs. Archived Plans)

## Account History Page

- ▶ Review and verify the Account History for the given Plan.
- ▶ Close the Account History by selecting the close symbol “x” on the top right corner of the browser and continue your review of the Plan page (Slide 5).

Report ID : RBR110  
Report Date : 03/27/2017  
Report Time : 11:23:34

PBGC - PREMIUM SYSTEM  
ACCOUNT HISTORY

AS OF: 06/30/2016

EIN/PN/Plan ID: 119922110/567/

Page No : 2 Of 2

PLAN NAME: Retirement Plan 4 ADDRESS:						PLAN EFFECTIVE: 01/01/2010 PLAN STATUS: Active		
PLAN YEAR	PCOUNT	PREMIUM	DUE DATE	RATE	PREMIUM DUE	INTEREST DUE	PENALTY DUE	TOTALS
01/01/2010	5	FLAT	04/30/2011	9.00 0.009	45.00 0.00	8.57 0.00	45.00 0.00	98.57 0.00
Final filing was received and a balance is due							AMOUNT DUE	98.57
PAYMENTS & ADJUSTMENTS							FILING DATE	
Multiemployer Plan							AMOUNT OWED	98.57
Coverage Start Date 01/01/2010 Coverage End Date								
Interest is compounded daily. Interest rates are as follows.								
From	To	Rate	From	To	Rate			
10/01/2016	12/31/2016	0.04	07/01/2016	09/30/2016	0.04			
04/01/2016	06/30/2016	0.04	01/01/2016	03/31/2016	0.03			
10/01/2015	12/31/2015	0.03	07/01/2015	09/30/2015	0.03			
04/01/2015	06/30/2015	0.03	01/01/2015	03/31/2015	0.03			
10/01/2014	12/31/2014	0.03	07/01/2014	09/30/2014	0.03			
04/01/2014	06/30/2014	0.03	01/01/2014	03/31/2014	0.03			
10/01/2013	12/31/2013	0.03	07/01/2013	09/30/2013	0.03			



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