

My Plan Administration Account (My PAA) Review In-Process Filing(s) in Your Account



Review In-Process Filing(s) in Your Account

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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Review In-Process Filing(s) in Your Account

Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the “Review In-Process Filings(s)” link in the Returning User section.
 - ❖ The All In-Process Filings(s) 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”.

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](#)

2016 Comprehensive 03/07/2016 PRINCETON SEARCH, LLC 401(K) PLAN 45-0486163 / 002 Beth'o Testing

Review In-Process Filing(s) in Your Account

From the All In-Process Filing(s) Page

- Default radio button shows all of the Plan's screen-prepared and imported In-Process Filings.
- Select the "Held By Me" radio button to display In-Process Filings held by you.
- Select the "Held By Others" radio button to display In-Process Filings held by others.
- Select the appropriate "Filing" link in the Filing column.
 - ❖ The "Filing Manager" page will be displayed (Slide 5).

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



v.15.1.0.26

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 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
2015 Comprehensive		Retirement Plan3	44-5555555/ 777	Jack Black

Review In-Process Filing(s) in Your Account

From the Home Page

- You can review up to 10 screen-prepared and imported Filings in the “In-Process Filings” section. If necessary, select the “View All In-Process Filings” link, to see all of the Plan’s In-Process Filings (Slide 3).
- Select the appropriate “Filing” link in the Filing column of the In-Process Filings section.
 - ❖ The “Filing Manager” page will be displayed (Slide 5).

Note 1: You can sort the columns to find a particular filing.

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.

PBGC My PAA v. 15.1.0.26
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

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

In-Process Filings

View all In-Process Filings > ← Instructions

Filing	Last Routed	Plan Name	EIN/PN	Held By
2015 Comprehensive	←	My Retirement 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
2015 Comprehensive		Retirement Plan3	44-5555555 / 777	Jack Black

Plans in Jack Black's Account

View all Plans > Instructions

Plan Name	EIN/PN	Actions
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)

Transfer filing data into My PAA editing screens for review and submission for any plan(s) in your account.

Upload Software-Prepared Filing(s)

View all Uploads > Instructions

Review In-Process Filing(s) in Your Account

Filing Manager Page

- **Filing Status:** Shows whether the filing is ready for submission and who is holding the filing.
- If the person holding the filing is not available to route the filing for the necessary action to be taken, you can select the “Retrieve Filing” button.
- **Filing Task List:** The buttons that show depend upon your filing “permissions” and who is holding the filing.
 - ❖ Select the “View/Edit Filing” button to view or edit a comprehensive filing.
 - ❖ Select “Sign” button to certify a comprehensive filing as a Plan Administrator (PA) or PA Representative.
 - ❖ Select “Sign” button as Plan Actuary to certify the actuarial information of the comprehensive filing.
 - ❖ Select “Authorize” button as Paying Agent to submit a payment or identify the type of payment that will be made.
- **Filing Team Section:** Used to route the filing to other team members.
- Select the appropriate link to Logout of My PAA or to go to another page (e.g., the Plan page).

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
NEW 2016 FILING WITH CBA DATE – 78-9444111 / 001

1 Start a Draft Filing → 2 Edit Draft, Sign Filing, and Select Payment Alternative → 3 Submit Filing with Payment (if any) → 4 Receive Filing Confirmation

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 not holding the filing

Filing held by: Beth'o Testing, 202-326-4000, reddy.raj-testing@pbgc.govxxxpbgc [Retrieve Filing](#)

Filing Task List [Instructions](#)

[View Filing](#) This filing is not complete because the flat rate has changed since you saved your filing. To update this filing, click the "View/Edit Filing" button, scroll to the section of the summary page that shows the flat-rate calculation, and click that section's "Edit" link.

Requires Plan Administrator or PA Representative Signature

No Actuary Signature Required

Requires Paying Agent authorization

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	
Vijaya Erukulla	Actuary, Plan Administrator's Representative, Preparer, Paying Agent, View Account History	202-326-4000	mail@mail.com	
Beth'o Testing	Preparer, Filing Coordinator, Actuary, View Account History, Paying Agent, Plan Administrator	202-326-4000	reddy.raj-testing@pbgc.govxxxpbgc	Holding
Shawn Parker	Filing Coordinator, Preparer, Actuary, View Account History, Paying Agent	802-944-1515	sparker@mgks.comoxpbgc	

LAUNCH PAGE HOME PLANS FILINGS HELP My Account Logout v.15.1.0.27

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

1 Start a Draft Filing → 2 Edit Draft, Sign Filing, and Select Payment Alternative → 3 Submit Filing with Payment (if any) → 4 Receive Filing Confirmation

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.

[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
Sue Practitioner	Preparer, Plan Administrator, Actuary,	202-222-4000	spractitioner@workemail.com	Route To