

My Plan Administration Account (My PAA) Review Plans in Your Account (Active Plans vs. Archived Plans)



Review Plans in Your Account (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.

 **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 Plans in Your Account (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 Users 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”.

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](#)

Review Plans in Your Account (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.

The screenshot displays the PBGC account interface. At the top, there is a navigation bar with links for LAUNCH PAGE, HOME, PLANS, FILINGS, and HELP, along with My Account and Logout. Below this, the page title is "All Plans in Jack Black's Account".

The "Active Plans" section features a search bar, "Search", "Clear Search", and "Move to Archived Plans" buttons. It contains 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

The "Archived Plans" section features a search bar, "Search", "Clear Search", and "Move to Active Plans" buttons. It contains a table with the following data:

Plan Name	EIN/PN	Actions
Retirement Plan 5	10-2102102 / 001	Create a Filing, Invite a Practitioner
Retirement Plan 6	65-0425084 / 002	Create a Filing, Invite a Practitioner
Retirement Plan 7	10-3103103 / 001	Create a Filing, Invite a Practitioner
Retirement Plan 8	74-2980802 / 231	Create a Filing, Invite a Practitioner

Review Plans in Your Account (Active Plans vs. Archived Plans)

From the Home Page

- You can review up to 10 plans in alphabetical order in the Plans in your Account section. If necessary, select the “View all Plans” link to see all of your Plans (Slide 3).
- Select the appropriate plan name from the “Plan Name” column in the Plans in your Account section.
 - ❖ The Plan Page will be displayed (Slide 5).

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.

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 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

Plans in Jack Black's Account View all Plans > Instructions Search Clear Search

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) Instructions Import 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 Plans in Your Account (Active Plans vs. Archived Plans)

Plan Page

➤ Plan Information:

- ❖ Review Plan Sponsor, Plan Administrator, and Plan Contact in the Plan Information section.

➤ Account History:

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

Note: You must have been given the “permission” to view the plan’s Account History.

➤ Premium Filings for the Plan (Screen-Prepared and Imported Only):

- ❖ “All Filings” is the default option selected, which displays the In-Process Filings first and then the Submitted filings.
- ❖ Select a “Filing” Link to review an In-Process filing via the Filing Manager Page or to review the receipt for a submitted filing.

➤ Premium Filing Practitioners for the Plan:

- ❖ Review practitioner permissions for the Plan in the “Premium Filing Practitioners” section.
- Select the appropriate link to logout of My PAA or to go to another page (e.g., the Home page).

The screenshot shows the My PAA Plan Page interface. At the top, there is a navigation bar with links for LAUNCH PAGE, HOME, PLANS, FILINGS, and HELP. On the right side of the navigation bar, there are links for My Account and Logout. Below the navigation bar, the page title is "Plan Page". The main content area is divided into several sections:

- Plan Information:** This section displays "Retirement Plan 4 - 55-6666666 / 777". It includes fields for Plan Sponsor, Plan Administrator, and Plan Contact. A red arrow points to the "Plan Information" link.
- Account History:** This section displays "Premium Filings and Payments Received by PBGC" and "Account History". A red arrow points to the "Account History" link.
- Premium Filings for the Plan (Screen-Prepared and Imported Only):** This section includes a "Create a Filing" link and radio buttons for "In-process", "Submitted", and "All filings". Below this is a table of filings:

Filing	ID	Received Date	Status
2015 Comprehensive	3743938		IN-PROCESS
2014 Comprehensive	3743985	4/8/2015 8:55:10 AM	SUBMITTED

- Premium Filing Practitioners for the Plan:** This section includes an "Invite a Practitioner" link and a table of practitioners:

Edit	Name	Permissions	Phone	Email	Remove Practitioner
	Sue Practitioner	Plan Administrator, Paying Agent, Preparer	202-326-4000	SPRACTITIONER@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	