

# **My Plan Administration Account (My PAA) Submit a Comprehensive Filing**



# Submit a Comprehensive Filing

## 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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# Submit a Comprehensive Filing

## 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 Filing(s)” link in the Returning User section.
  - ❖ The All In-Process Filing(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

# Submit a Comprehensive Filing

## From the All In-Process Filing(s) Page

- 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.



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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 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

# Submit a Comprehensive Filing

## From the Home Page

- Select the appropriate “Filing” link in the In-Process Filings section.
  - ❖ The “Filing Manager” page will be displayed (Slide 5).
- If necessary, select the “View all in-Process Filings” to see all of the plan’s in-process filings (Slide 3).

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! My Account Logout

**LAUNCH PAGE** HOME PLANS FILINGS HELP

### 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 Plan 1	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 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

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

**Upload Software-Prepared Filing(s)** View all Uploads > Instructions

# Submit a Comprehensive Filing

## Step 3: Submit Filing (with payment, if due)

ELECTRICAL WORKERS PENSION TRUST FUND OF LOCAL UNION NO 68 IBEW – 38-6080404 / 001



### Filing Manager

[Go to Plan Page](#)

**Filing Status**

Filing is: **ready for submission** (refer to 'To submit this filing' below)

➔
[Submit Now](#)
➔
[Submit Later](#)
➔

Note: Click the "submit now" button only once or you may encounter an error.

**Filing Task List** -> Instructions

<a href="#">View/Edit Filing</a>	✓ This filing contains all the required information. <span style="float: right; background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">Delete Filing</span>
	✓ Plan Administrator or PA Representative e-signature completed 10:25 AM, 7/6/2016 Eastern Time <span style="float: right; color: #0056b3; text-decoration: underline;">Remove Signature</span>
	No Actuary Signature Required
<a href="#">Edit E-Payment</a>	✓ Authorization for payment alternative completed Payment alternative selected: Other 2:41 PM, 7/7/2016 Eastern Time

**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	
Tommy Testing	Filing Coordinator, Actuary, Paying Agent, Preparer, Plan Administrator, View Account History	972-458-9888	beth.test@pbgc.govxx	Holding
Kothq Xwcpfpunm Puk	Paying Agent, Plan Administrator, Preparer, View Account History, Filing Coordinator	270-960-7894	nus@yqcff.wvr	<a href="#">Route To</a>
Tjmnxm Aehyn	View Account History, Paying Agent, Preparer, Plan Administrator, Filing Coordinator	915-711-4641	fcwrm@rishr.qsg	<a href="#">Route To</a>

## Filing Manager Page

- This page confirms that all the tasks in the “Filing Task List” section have been completed and the filing is ready for submission.
  - The Filing Coordinator or PA/PA Rep must hold the filing in order to see the “Submit Now” or Submit Later” buttons.
  - Select the “Submit Now” button to go to Submit Confirmation Page (Slide 6).
- OR
- Select the “Submit Later” button to go to the Schedule Filing and Payment (if any) Submission Page (Slide 7).

Note: The “Submit Later” button only shows if there is an amount due.

# Submit a Comprehensive Filing

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## Submit Now Confirmation Page

- This page asks you to confirm that you are ready to submit the filing.
- If you are not ready, select the “Return” button to go to the Filing Manager page (Slide 5).
- If you are ready, select the “Submit” button to submit the filing to PBGC and see the Receipt (slide 8).



LAUNCH PAGE HOME PLANS ▾ FILINGS ▾ HELP My Account Logout

### Submit Confirmation

Are you sure you are ready to submit the 2015 Comprehensive Premium Filing to PBGC? Selecting the "Submit" button will send the filing to PBGC. Selecting the "Return" button will return you to the Filing Manager page.

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# Submit a Comprehensive Filing

## Submit Later - Schedule Filing and Payment (if any) Submission Page

- Enter the date you want the filing/payment to be submitted.
- Select the “OK” button to schedule the filing for submission and see the Receipt (Slide 8).



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### Schedule Filing and Payment (if any) Submission

Please enter the date you would like this filing and payment (if the payment was made using My PAA) to be automatically submitted to PBGC. You will receive an e-mail notification when your filing and payment (if the payment was made using My PAA) are received by PBGC.

Submit this filing and payment (if any) on:

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# Submit a Comprehensive Filing

## Receipt for Comprehensive Premium Filing Page

- Review and verify the Receipt which shows the filing details.
- Select the close symbol “x” on the top right corner of the browser to close the Receipt and to go to the Confirmation page (slide 9).

### Receipt for Comprehensive Premium Filing

Date/Time Filing Received: 5/1/2015 12:00:00 AM Eastern Time

Your reference number for this transaction is: **3743940**

Please note that this transaction is subject to further verification and does not guarantee satisfaction of filing requirement or premium liability. If this filing is late or the premium paid insufficient, PBGC will subsequently send the Plan Administrator a Statement of Account (Premium Invoice) that shows the amount owed to PBGC.

Payment Alternative:	Other
Flat-rate Premium:	\$23,920.00
Premium Credit:	\$2,400.00
Premium Amount Due:	\$21,520.00

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# Submit a Comprehensive Filing

## Confirmation of Premium Filing Submission Page

- This confirms that you have successfully submitted your premium filing to PBGC and completed the filing process (Step 4).

Note: If you selected the “Submit Later” button, the filing will be submitted on the requested date.

- Select the appropriate link/button to log out of My PAA or go to another page (e.g., Return to Home Page).

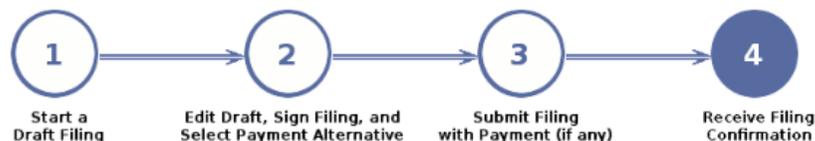


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### Step 4: Confirmation of Premium Filing Submission

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan3 – 44-5555555 / 777



#### Confirmation of Premium Filing Submission

This confirms that the premium filing was successfully submitted to PBGC (or will be submitted if “submit later” was selected). The e-filing process is now complete.

The filing receipt can be accessed on the Plan Page. In addition, the filing and payment (if any) will typically be posted within a few days to the plan’s Account History, which reflects the plan’s premium filing history by plan year. The Account History can be viewed on the Plan Page if you have the “view account history permission”, which is assigned by the plan’s Filing coordinator.

[Return to Home Page](#)

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