

# **My Plan Administration Account (My PAA) Upload Software-Prepared Filing(s) via My PAA**

# Upload Software-Prepared Filing(s) via My PAA

## 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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# Upload Software-Prepared Filing(s) via My PAA

## Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the “Upload a Filing” link in the Returning Users section.
  - ❖ The Upload 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

# Upload Software-Prepared Filing(s) via My PAA

## From the Home Page

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

Note: 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.15.1.0.27  
**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 +

#### 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)

Instructions +

#### Upload Software-Prepared Filing(s)

View all Uploads > 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. ID/ Receipt" to view the receipt(s) showing data submitted for each filing. View this section's Instructions for details.

**Upload Filing(s)** ←

File Name	Comments	Conf. ID/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

# Upload Software-Prepared Filing(s) via My PAA

## Upload Software-Prepared Filing(s) Page

- Select The “Browse” link to select the appropriate file to Upload.
- Enter or select the requested information for the uploaded filing, e.g., this file contains one premium filing.
- Select the “Next” button to go to the next screen.



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### Upload Software-Prepared Filing(s)

Select the file you created with your private-sector software that contains the premium filing to be submitted.

Note: The file must be in a PBGC-defined XML format. [What does this mean?](#)

Select File:

The file you upload can contain one or more premium filings for one or more plans. Select one of the following statements about the file you selected above:

This file contains **one** premium filing.

This file contains **more than one** premium filing.

Enter Comments (optional)

Enter any comments that will help you to identify this filing, e.g., plan name. You will be able to access these comments from the list of uploaded filings on your Home Page. This field is provided for your convenience; it is not intended for correspondence with PBGC. (Maximum number of characters: 1,000)

Indicate E-mail Preference

I would like to receive an e-mail confirmation when the e-filing process is complete.

Note: The e-mail will be sent to the address on record for you in My PAA. (To view this e-mail address and make any necessary changes, click the “My Account” link at the top of the page.) Whether or not this box is checked, a confirmation screen will be provided for all fully completed transactions, and you can print the confirmation screen for your records.

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# Upload Software-Prepared Filing(s) via My PAA

## Upload Software-Prepared Filing(s) Page

- Review the Filing Summary and Certification information.
- Select the “Edit” button to make any changes to the Filing Summary data.
- Enter or select the requested information (e.g., Secret Answer) and select “Certify Finding(s) and Submit” button which will submit the uploaded filing(s).
- If the file contains one premium filing, the Payment Alternatives page (slide 6) will be displayed.
- If the file contains more than one premium filing, the Upload Confirmation page (Slide 7) will be displayed.
- Select the “Back” button to go to the previous page (Slide 4).

### Upload Software-Prepared Filing(s)

**Filing Summary**

Listed below is information you entered regarding the file you selected to submit to PBGC. If any of this information is not correct, click the “Edit” button. If this information is correct and you are ready to submit the filing, click the “Submit” button.

<b>File Name:</b>	2015 SE Filing-2.xml
<b># of Filings:</b>	This file contains one premium filing.
<b>Comments:</b>	This is a Test File
<b>E-mail Confirmation:</b>	You opted to receive an e-mail confirmation

Note: A confirmation e-mail will be sent to the address on record for you in My PAA. To view this e-mail address and make any necessary changes, click the “My Account” link at the top of the page.

[Edit](#)

**Certification of Filing** [Certification Rules](#)

To upload a file containing one or more premium filings, you must place a check in the checkbox to indicate that you understand the certification you are making, enter your Secret Answer, and click the “Certify Filing(s) and Submit” button.

For each premium filing in the file I am uploading, I certify under penalty of perjury, to the best of my knowledge and belief, that I am authorized to submit the premium filing to the PBGC and:

If I am the enrolled actuary, that the variable-rate premium information in the filing is true, correct and complete and has been determined in accordance with the PBGC’s premium regulations and instructions, except that if the filing reports an estimated premium funding target, the estimate is reasonable, takes into account the most current information available to me, and has been determined in accordance with generally accepted actuarial principles and practices; or

If I am the Plan Administrator, that all the information in the filing is true, correct and complete and has been determined in accordance with the PBGC’s premium regulations and instructions, except that if the filing reports an estimated premium funding target, the estimate is reasonable, takes into account the most current information available to the enrolled actuary, and has been determined in accordance with generally accepted actuarial principles and practices, and that if I received variable-rate premium information certified by an enrolled actuary for this filing, the variable-rate premium information in the filing is the same as the variable-rate premium information certified by the enrolled actuary.

**As an extra security precaution, enter below the answer to your Secret Question before clicking the “Certify Filing (s) and Submit” button.**

I understand that under the Government Paperwork Elimination Act (“GPEA”) (Title XVII of Public Law No. 105-277), my answer to my secret question will be deemed the equivalent of my handwritten signature and as binding under 18 U.S.C. 1001 (dealing with false statements) as an inked signature.

**Secret Question:** What is your mother’s maiden name?

**\* Secret Answer:**

[< Back](#) [Cancel](#) [Certify Filing\(s\) and Submit](#)

# Upload Software-Prepared Filing(s) via My PAA

## Payment Alternatives Page

- This page will show only if you uploaded one filing.
- Select one of the Payment Alternatives and complete the requested information (step 2 of the filing process).

Note: Examples of the screens for the Payment Alternatives can be found within the “Select Payment Alternative” Demo.

- Complete the upload process and review the confirmation page (Slide 7).



### Payment Alternatives

You have uploaded an XML file that contains your filing information. You must still select one of the payment alternatives below to complete the e-filing process.

**Important:** A complete premium filing has two parts:

- (1) The information you just uploaded in your XML file, and
- (2) The payment of any premium due.

For your filing to be considered timely, you must submit both of these items by the filing due date.

• I wish to pay online via My PAA and authorize PBGC to “pull” the payment (ACH) from the account described.

[Pay Online using My PAA](#)

• If you want to make the payment yourself, select one of the following options which describes how you expect to pay PBGC:

[Pay via Pay.gov \(outside of My PAA\)](#)

[Pay via Electronic Funds Transfer \(outside of My PAA\)](#)

[Pay using a Paper Check](#)

• Other:

[No Payment Due](#)

[Other](#)

[Back to Home Page](#)

# Upload Software-Prepared Filing(s) via My PAA

## Upload Confirmation Page

- This confirms that the upload process is complete (step 3).
- Select appropriate link/button to logout of My PAA or to go to another page (e.g., Back to Home Page).



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

- 1 Upload Filing(s)
- 2 Select Premium Payment Alternative for Single Filings
- 3 Receive Confirmation of Filing(s) and Payment (if any)

Your Confirmation ID for this transaction is 3743951.  
You have submitted your filing information online to PBGC. A summary of the filing information is provided below. Thank you for using My PAA.

**File Summary**

Date/Time Received:	4/7/2015, 10:30 AM, Eastern Time
File Name:	2015 SE Filing-2.xml
# of Filings:	This file contains <b>more than one</b> premium filing.
Comments:	This is a Test for more than one filing
E-mail Confirmation:	You opted to receive an e-mail confirmation

Click the "Return to Home Page" button. Your Home Page will be displayed and the file you uploaded (including the confirmation ID) will now be listed there in the section labeled "Uploaded Software-Prepared Filings."

Note: My PAA includes some features that you can take advantage of for each plan for which you are responsible for submitting a premium filing. To use these features, a plan must be included in your account. [What does this mean?](#)

[Return to Home Page](#)

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