# My Plan Administration Account (My PAA) Review, Edit, Sign, and Route/Retrieve a Filing

# Review, Edit, Sign, and Route/Retrieve a 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:** jackblack

**Password:** •••••••••• (Case Sensitive)

**Login**

⁑ Forgot your User ID?   ⁑ Forgot your Password?

⁑ New users click here to sign up.

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# Review, Edit, Sign, and Route/Retrieve a 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 Users 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".
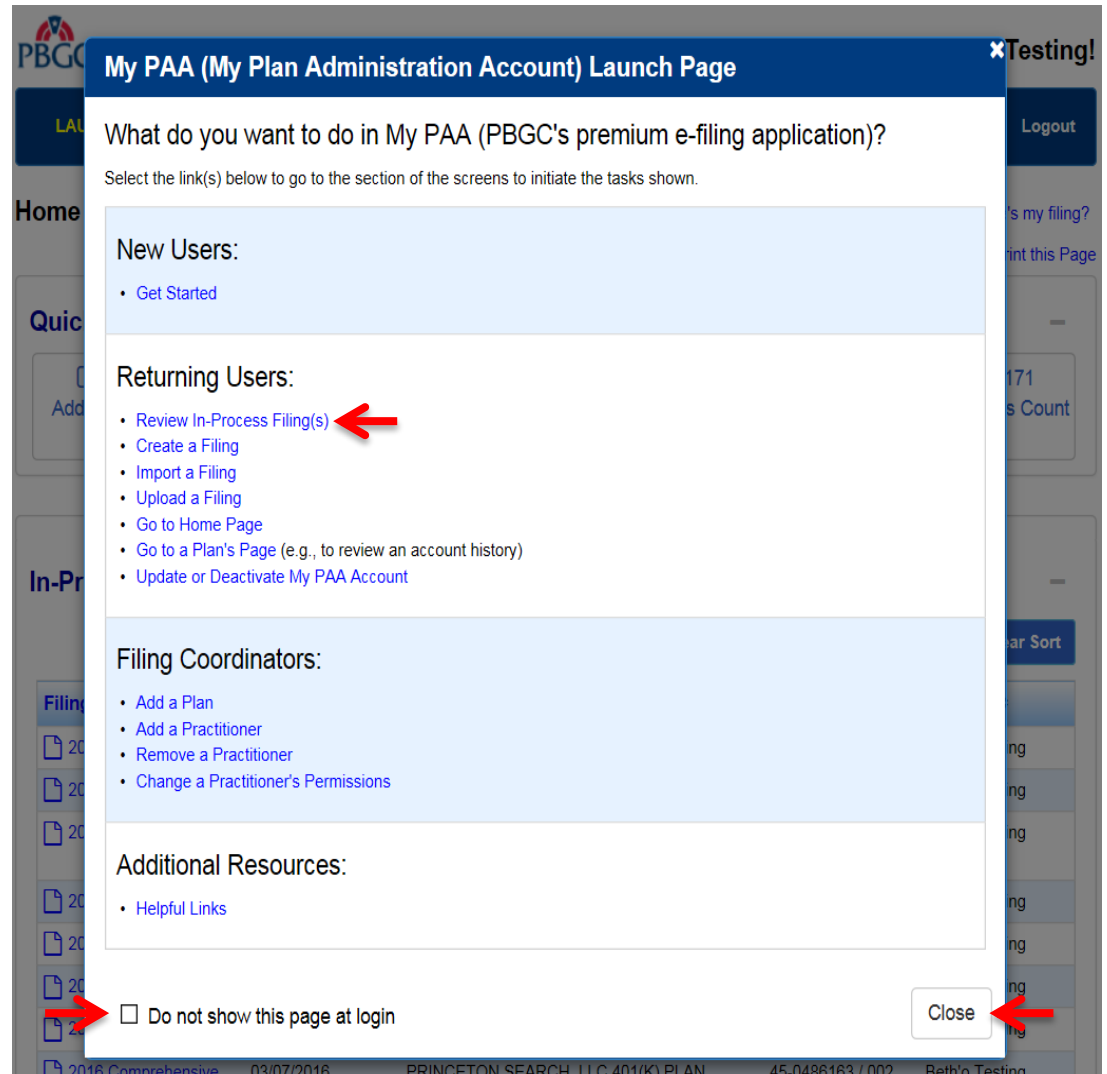
# Review, Edit, Sign, and Route/Retrieve a Filing

**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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## All In-Process Filing(s)

○ Held By Me ○ Held By Others ● All Filings     **Clear Sort**

⸱∺ 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 |

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# Review, Edit, Sign, and Route/Retrieve a 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" link 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.

# Review, Edit, Sign, and Route/Retrieve a Filing

## Filing Manager page – View/Edit Filing

➢ Review the Filing status in the Filing Status section to see whether the filing is ready for submission and who is holding the filing.

➢ Select the "Retrieve Filing" button if you need to take action on the filing and the person holding the filing is not available to route the filing to you.

➢ Select the "View/Edit Filing" button in the Filing Task List section to view or edit the filing.

  ❖ The Data Summary Page will be displayed (Slide 6).

# Review, Edit, Sign, and Route/Retrieve a Filing

## Data Summary Page

➢ This page lists all information entered thus far for your filing, separated into subsections.

➢ Select the "Print this Page" link on the top right corner of the page, to print this filing summary.

➢ Select the "View Printable Form" on the top right corner of the page, to view or print the draft filing receipt.

➢ Select the "Edit" link at the top of the each subsection, to make any changes to the filing data.

➢ Select the "Save & Continue"" button, to go to the next screen.

➢ Note: The "NA" next to any Item on this page indicates that the item was not answered or not applicable for the current filing.

**Step 2: Edit Draft, Sign Filing, and Select Payment Alternative**

Comprehensive Filing for Plan Year Commencing 1/1/2015

🖶 Print this Page
🖶 View Printable Form

Data Masking Test Plan 1 – 11-1222445 / 001

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

### Data Summary

**Please review the following reminders** and verify that the correct information has been reported (see black flag(🏴) next to section(s) impacted):

• We have no record of the EIN/PN shown below, which typically means that the plan is a new or newly covered plan. Please select the new or newly covered plan checkbox and enter the requested information or contact the premium staff to explain why the EIN/PN is appropriate (at premiums@pbgc.gov or 1-800-736-2444 and select the "premium" option).

• The business code does not appear to be valid. Please verify and change the entry if appropriate.

[Cancel]  [Save & Continue]

**Note: N/A indicates that this item was not answered or is not applicable.**

| Identify Filing to be Made | Edit |
|---|---|
| Plan Year Commencement Date: | 1/1/2015 |
| Plan Year Ending Date: | 12/31/2015 |
| Date plan year change adopted (if any): | N/A |
| Plan Type: | Single-employer |
| Filing Type: | Comprehensive |
| Plan qualifies for proration: | Checked |
| Plan size (small plan): | No |

| Enter Plan Information 🏴 | Edit |
|---|---|
| Plan Name: | Data Masking Test Plan 1 |
| Plan effective date: | 1/1/2015 |
| New or Newly Covered Plan: | Not Checked |
| Adoption date: | N/A |
| Date coverage began: | N/A |
| Continuation Plan: | N/A |
| Previous EIN / PN: | 11-1222445 / 001 |
| Current EIN / PN: | 11-1222445 / 001 |
| EIN/PN from 2014 Form 5500 (if different): | N/A |
| Explanation as to why EIN/PN does not match entry on 2014 Form 5500: | N/A |

| Enter Filing Information 🏴 | Edit |
|---|---|
| 6-digit business code: | 111700 |
| First 6 digits of CUSIP number: | N/A |
| Disaster Relief Code: | N/A |
| Variable-rate Exempt: | Yes |
| Reason for Exemption: | Yes, because the plan has no vested participants |

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# Review, Edit, Sign, and Route/Retrieve a Filing

## Filing Manger page – Sign Filing

➢ Use this page to sign the filing as the Plan Administrator (PA) or PA Representative (PA Rep).

➢ The "Sign" button(s) will only show if you are holding the filing and have the appropriate permission(s).

➢ Select the "Retrieve Filing" button if you need to take action on the filing and the person holding the filing is not available to route the filing to you.

➢ Select the "Sign" button as PA or PA Rep.

❖ The Approval for Comprehensive Filing Page will be displayed (Slide 8).

# Review, Edit, Sign, and Route/Retrieve a Filing

## Approval for Comprehensive Filing Page

➢ Review the certification information that is displayed (e.g., this page is for a single-employer plan administrator).

➢ Review your personal information and make changes, if necessary.

➢ To approve the filing, enter your "Secret Answer" and select the "Approve Filing" button to go the next screen.

# Review, Edit, Sign, and Route/Retrieve a Filing

## Filing Manger page – Sign Filing

➢ Use this page to sign the filing as Actuary.

➢ The "Sign" button(s) will only show if you are holding the filing and have the appropriate permission(s).

➢ Select the "Retrieve Filing" button if you need to take action on the filing and the person holding the filing is not available to route the filing to you.

➢ Select the "Sign" button as Actuary.

  ❖ The Approval for Comprehensive Filing Page will be displayed (Slide 10).

# Review, Edit, Sign, and Route/Retrieve a Filing

**Approval for Comprehensive Filing Page**

➢ Review the certification information that is displayed (e.g., this page is for Filing Summary).

➢ Enter The Actuary Information.

➢ Review your personal information and make changes, if necessary.

➢ To approve the filing, enter your "Secret Answer" and select the "Approve Filing" button to go the next screen.

# Review, Edit, Sign, and Route/Retrieve a Filing

## Filing Manager Page – Route Filing

➢ Use this page to route the filing to another Filing Team member, if needed (e.g., to sign the filing).

➢ Select the "Route to" button next to the person(s) name.

➢ The "Route to" button will appear on the screen, only if you are holding the filing.

➢ The "Route Filing" page will be displayed (Slide 12).

**Note 1**: If you are not available to route the filing, another filing team member may select the "Retrieve Filing" button on their Filing Manager page to retrieve the filing from you.

**Note 2**: The check marks in the Filing Task List section show that the filing has all the required information and e-signatures.

**Note 3**: The "Delete Filing" button will appear on the screen, only if you are the Filing Coordinator for the plan.

# Review, Edit, Sign, and Route/Retrieve a Filing

## Route Filing Page

➢ This page describes that the filing will be routed to the selected Filing Team member.

➢ You have the option to include an additional short message.

➢ Select the "Route Filing" button to initiate the routing.



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**Route Filing**

### Route Filing To: Sue Practitioner

This message will be sent to Sue Practitioner

The 2015 Comprehensive Premium Filing for Retirement Plan 4 (55-6666666/777) has been routed to you by Jack Black for your input. To open the filing, log in to My PAA by clicking the following link.

http://www.pbgc.gov/mypaa/login.aspx

If this link does not respond, re-type it (or copy and paste it) into your browser's address window. If you still experience difficulty, call the PBGC Contact Center at 1-800-736-2444

If you would like to include an additional message to be sent on your behalf (up to 256 characters), type it in the text box below:

This is a routing test

[ Cancel ]  [ Route Filing ]

Note: This process could take a while to complete. Only select the "Route Filing" button once or you will encounter an error.

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# Review, Edit, Sign, and Route/Retrieve a Filing

## Routing Confirmation Page

➢ This page confirms that the filing has been routed and the instructions email has been sent.

➢ Select the "Go to Your Home Page" button to see updated information (Slide 14).

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### Routing Confirmation

Sue Practitioner has been sent an e-mail on your behalf with instructions to log in to My PAA in order to review and approve the filing.

You can track the progress of this filing from the appropriate plan page.

Go to Your Home Page

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# Review, Edit, Sign, and Route/Retrieve a Filing

## Home Page

➢ Your Home Page reflects the following updates for the routed or retrieved filing that continues to show in the "In-Process Filings" section:

❖ The number of filings that you hold has reduced by one.

❖ The number of filings held by others has increased by one.

❖ The name of the person holding the filing has changed.

➢ Select the appropriate link/button to logout of My PAA or to go to another page (e.g., the Launch Page).