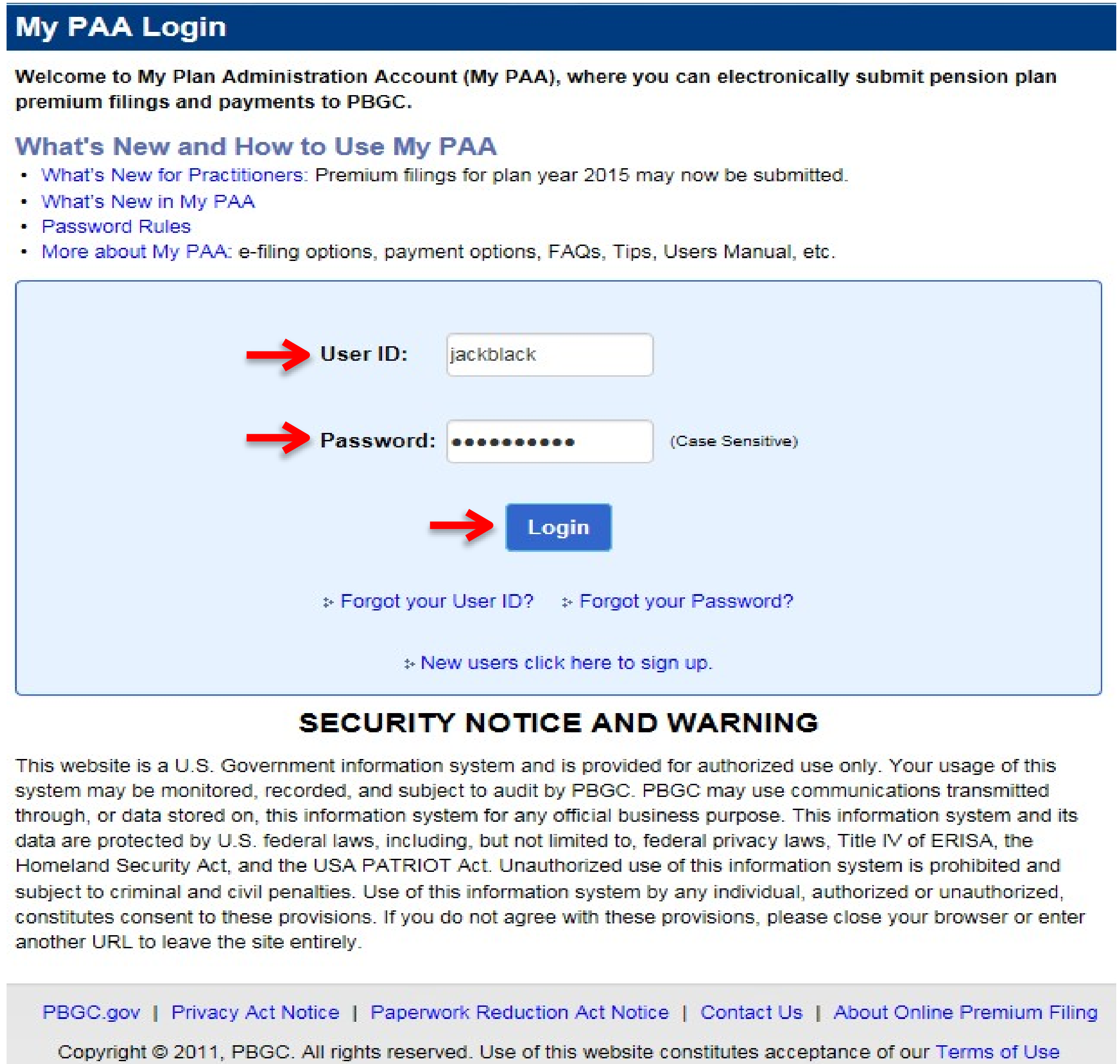
My Plan Administration Account (My PAA) Filing Coordinator: Add/Invite a Practitioner/Bulk Invite

Add/Invite a Practitioner

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“.

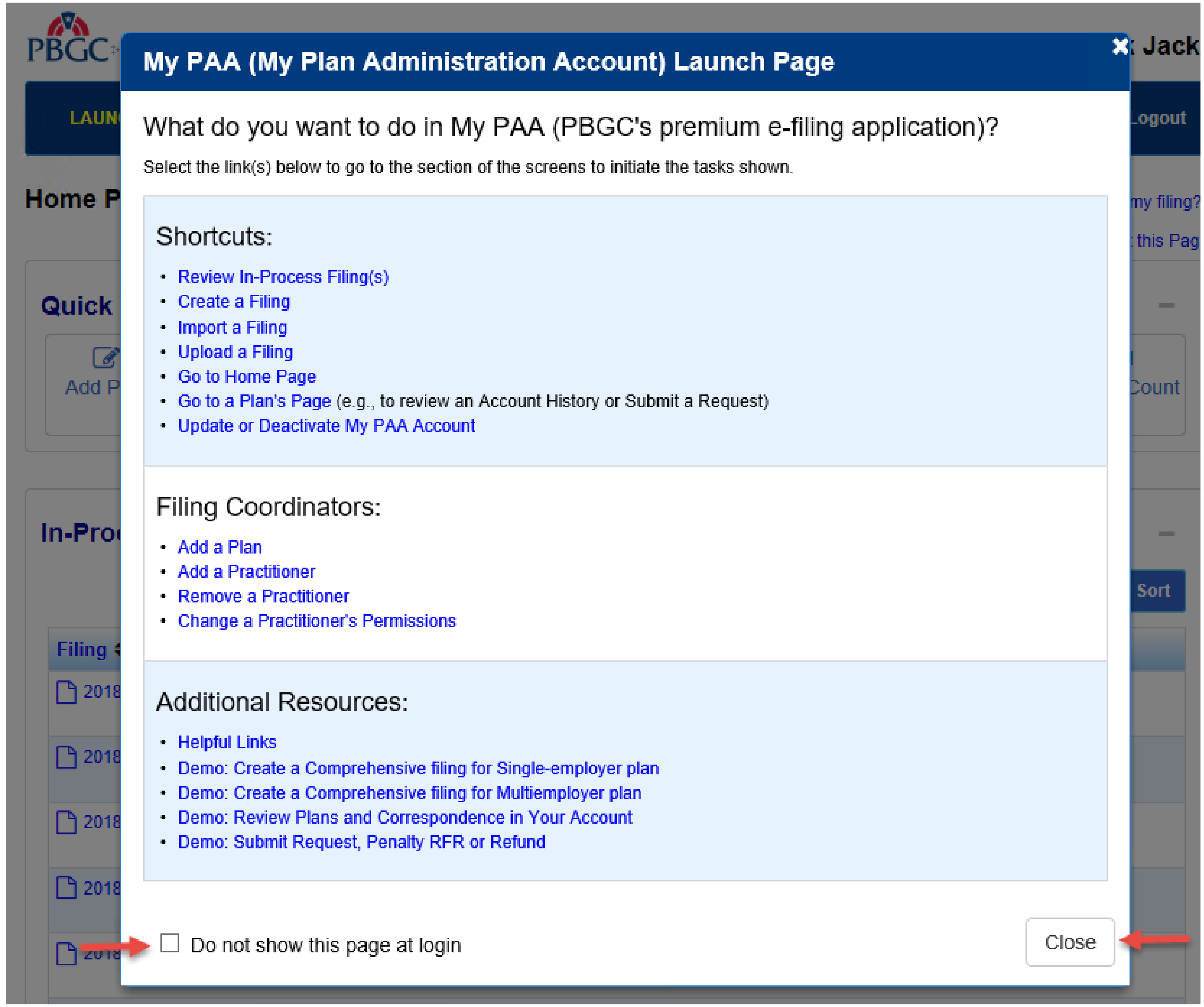


Add/Invite a Practitioner

Launch Page

- You are now logged into My PAA.
- If Launch Page overlaid on top of your Home Page is displayed, select the “Add a Practitioner” link in the Filing Coordinators section.
  - The All Plans in your Account Page will be displayed (Slide 5).
- If Home Page is displayed, go to 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”.

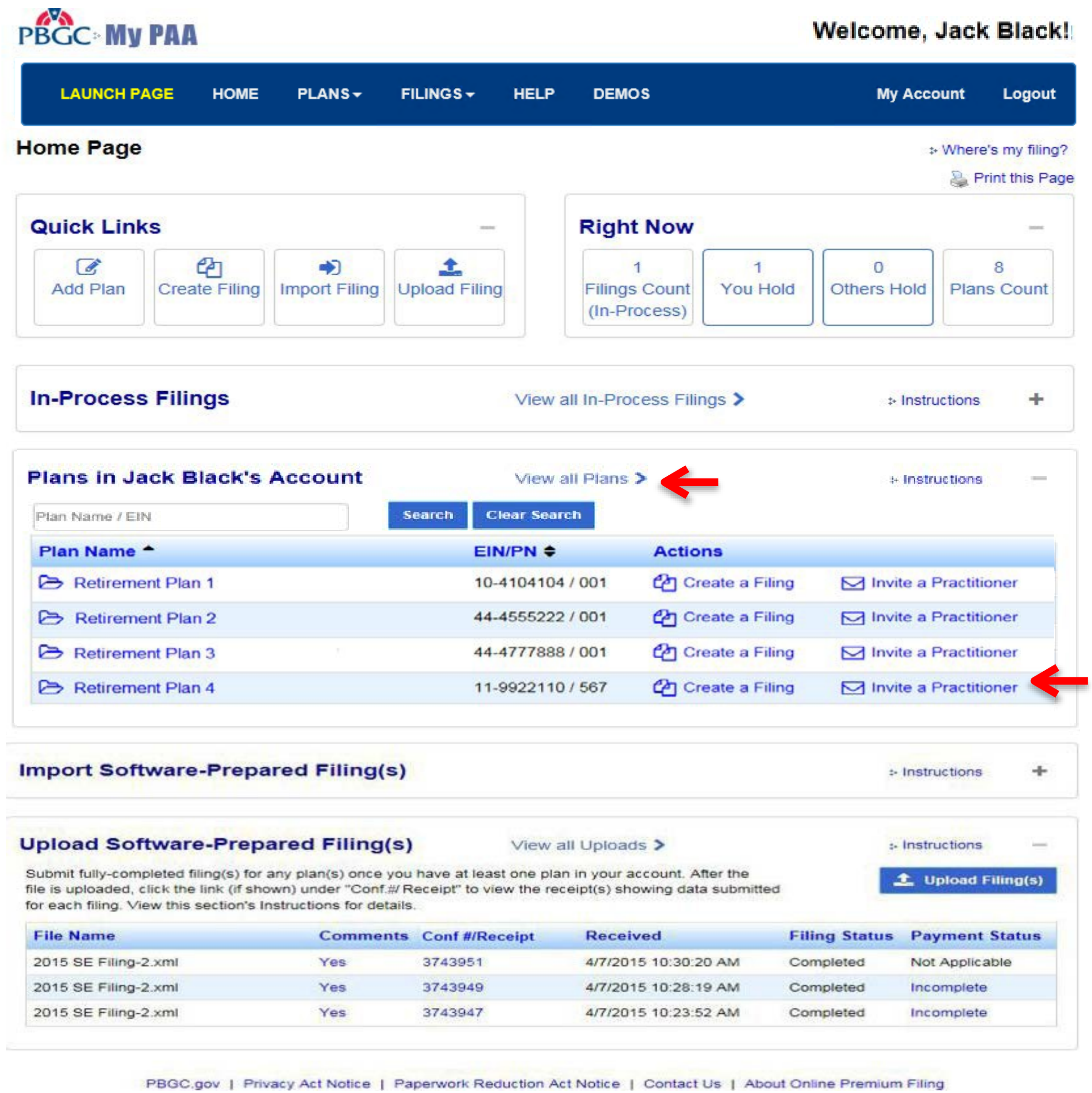


Add/Invite a Practitioner

From the Home Page

- Select the “Invite a Practitioner” link next to the plan in the Plans in your Account section.
  - The Invite a Practitioner Page will be displayed (slide 6).
- If necessary, select the “View all Plans” link to see all of your Plans (Slide 5).

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.

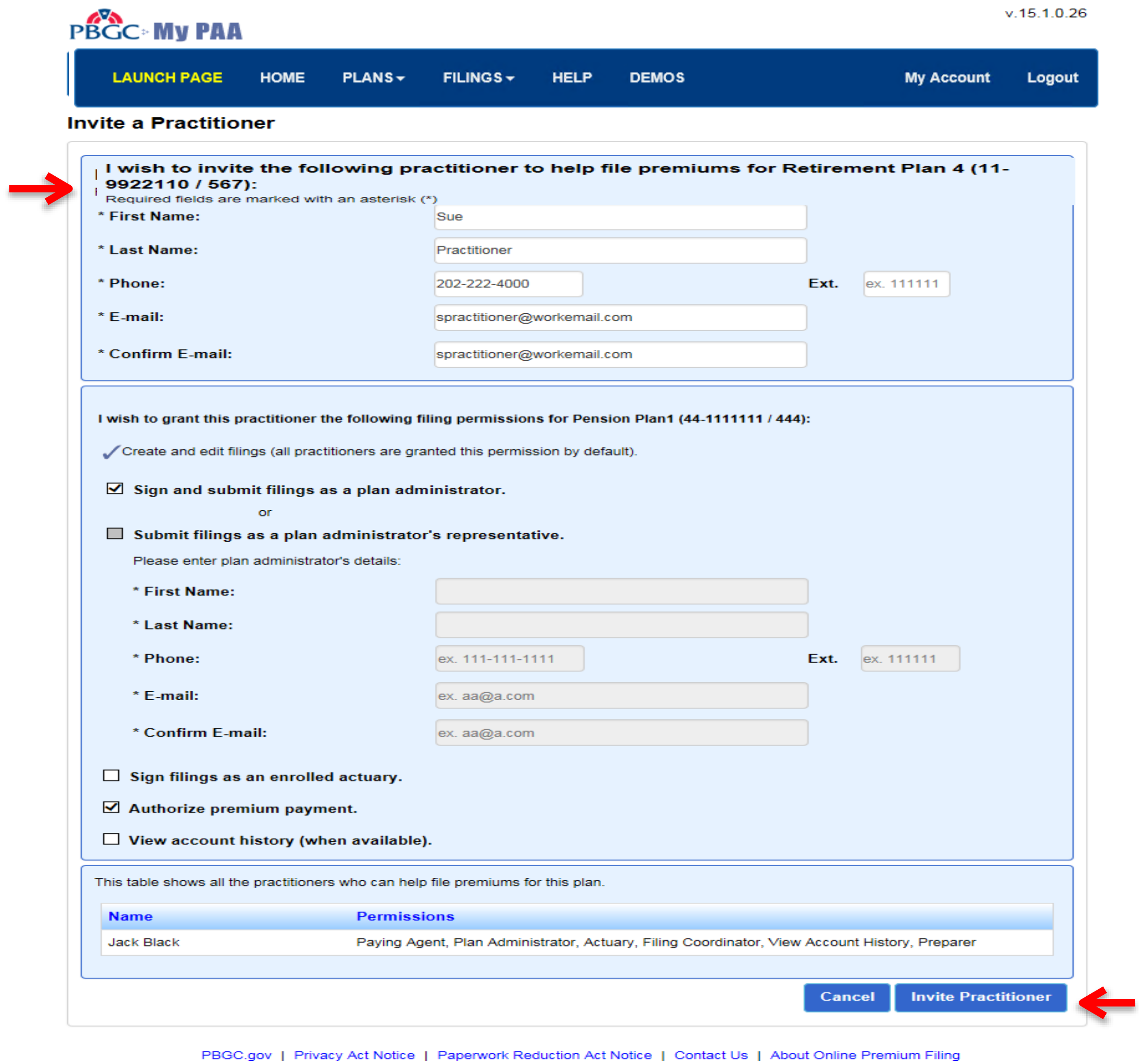


Add/Invite a Practitioner

Invite a Practitioner Page

- Enter information about the Practitioner you are adding to the plan (name, work phone number, and work email address).
  - The two email fields must match to proceed.
- Select the checkbox next to each permission you are granting for the practitioner.
- Select the “Invite Practitioner” button.
- Confirmation email message is sent to the Practitioner and this practitioner's name will be displayed in the plan list only once he or she signs up for My PAA.

Note: The **“*”** next to a field means that field is required for input.

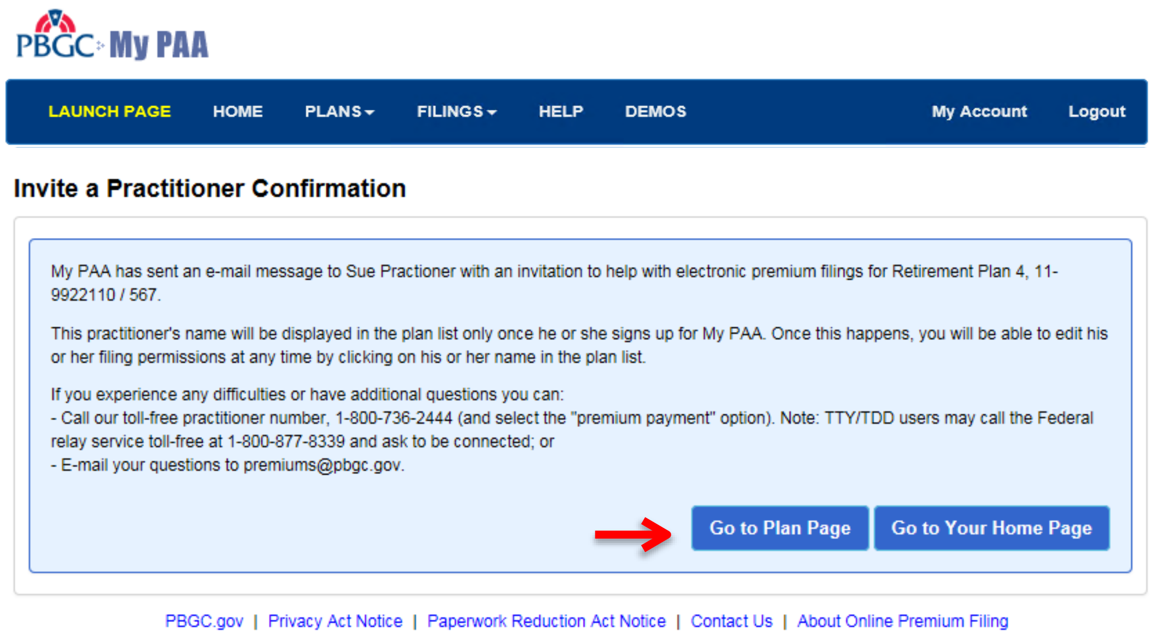


Add/Invite a Practitioner

Invite a Practitioner Confirmation Page

- This confirms that the practitioner previously set up a My PAA account and has been added to the Plan.
- Select the "Go to Plan Page" button to view the information about the newly-added practitioner.
  - The "Plan Page" will be displayed (Slide 7).

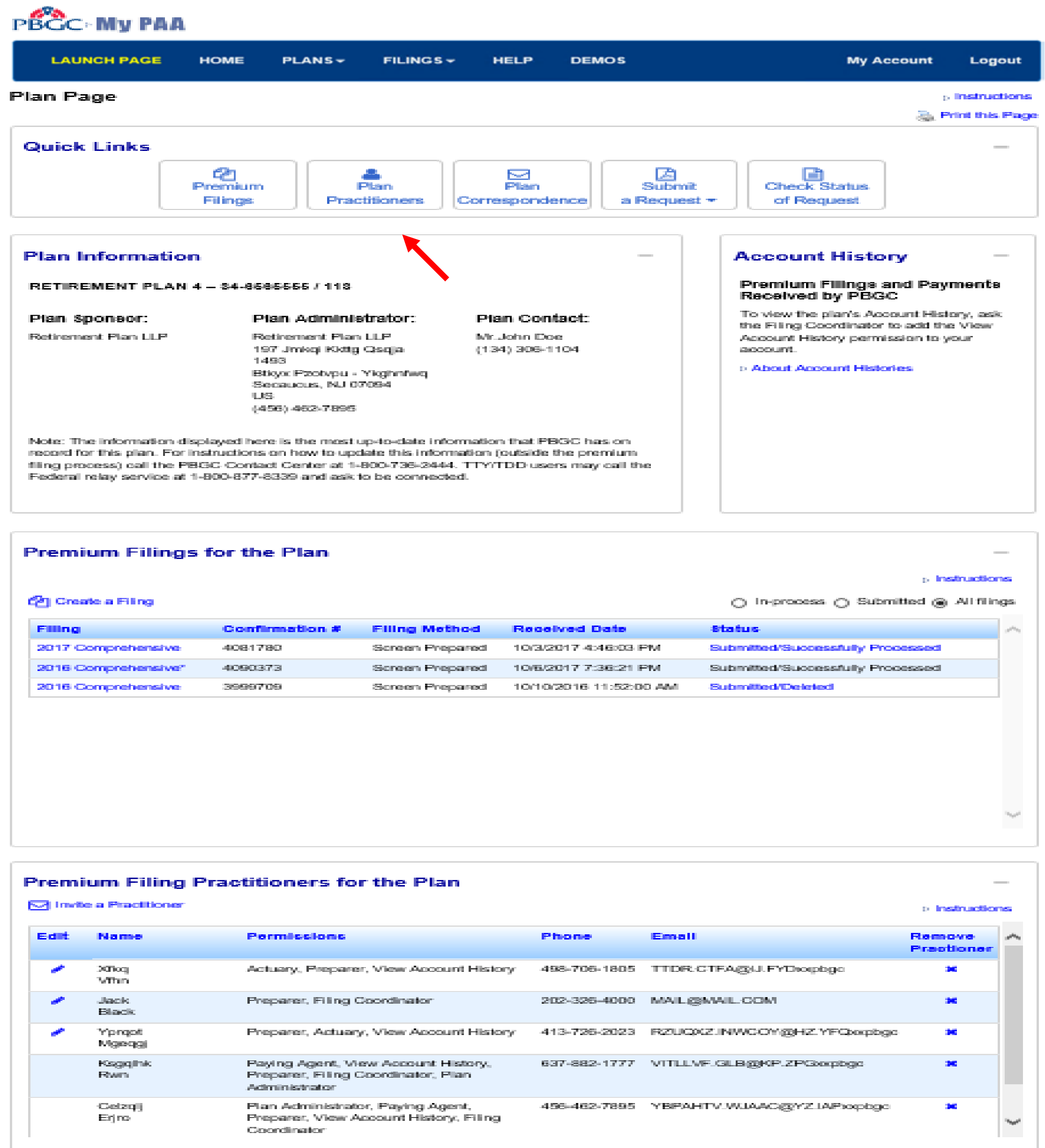
Note: If the invited Practitioner did not previously set up a My PAA account, the Confirmation Page will state that "This Practitioner's name will be displayed in the plan list only once he or she signs up for My PAA".



Add/Invite a Practitioner

Plan Page

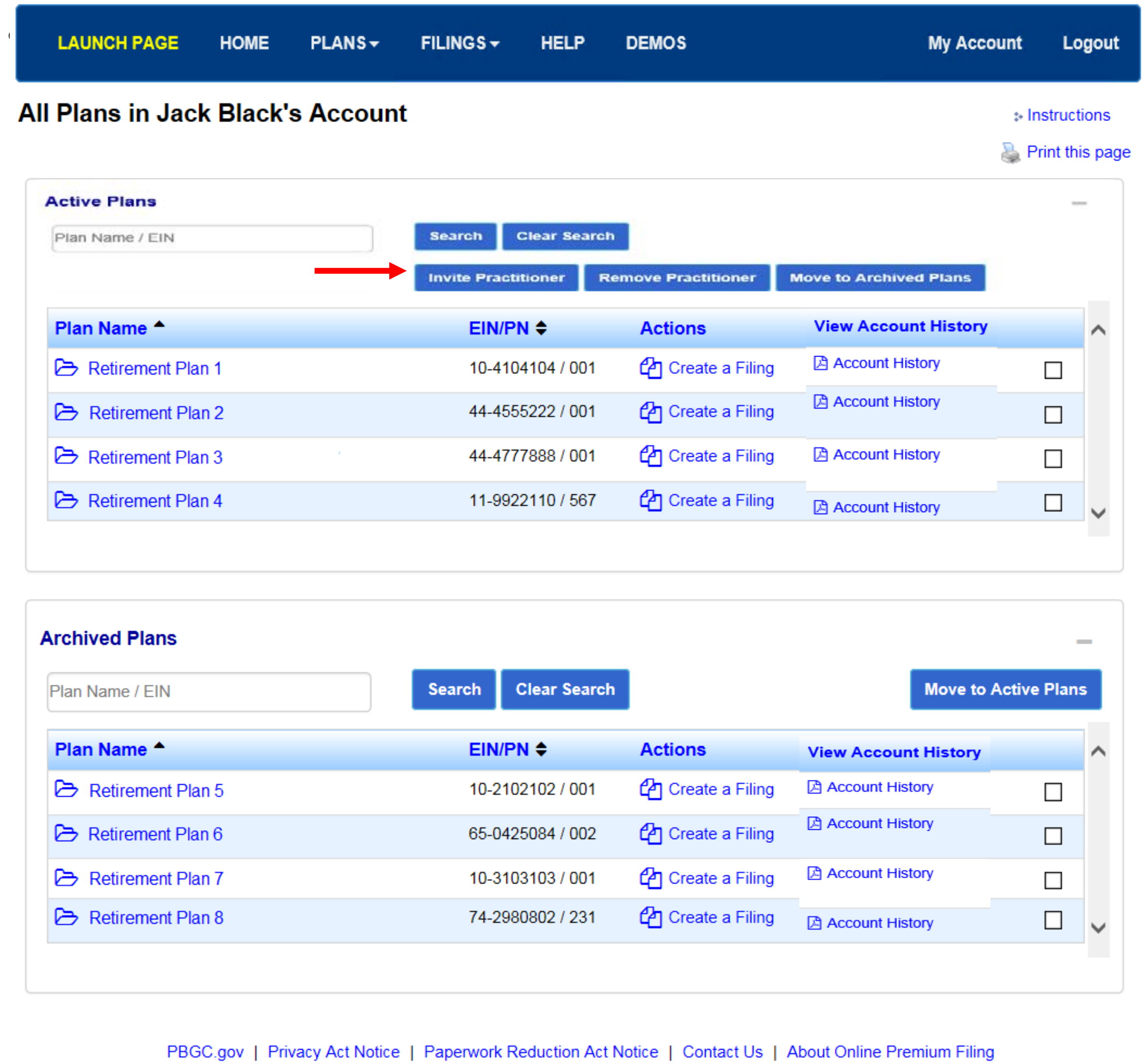
- Select the Quick link for Plan Practitioners.
- Information about the newly-added practitioner and the permissions granted are listed in the "Premium Filing Practitioners for the Plan" section.
- Use this section to make any needed changes to the practitioner's information.
  - Select the edit link to make changes to the practitioner.
  - Select The "**X**" to remove a practitioner.
- Select the appropriate link to logout or to go to another page (e.g., the Home page).



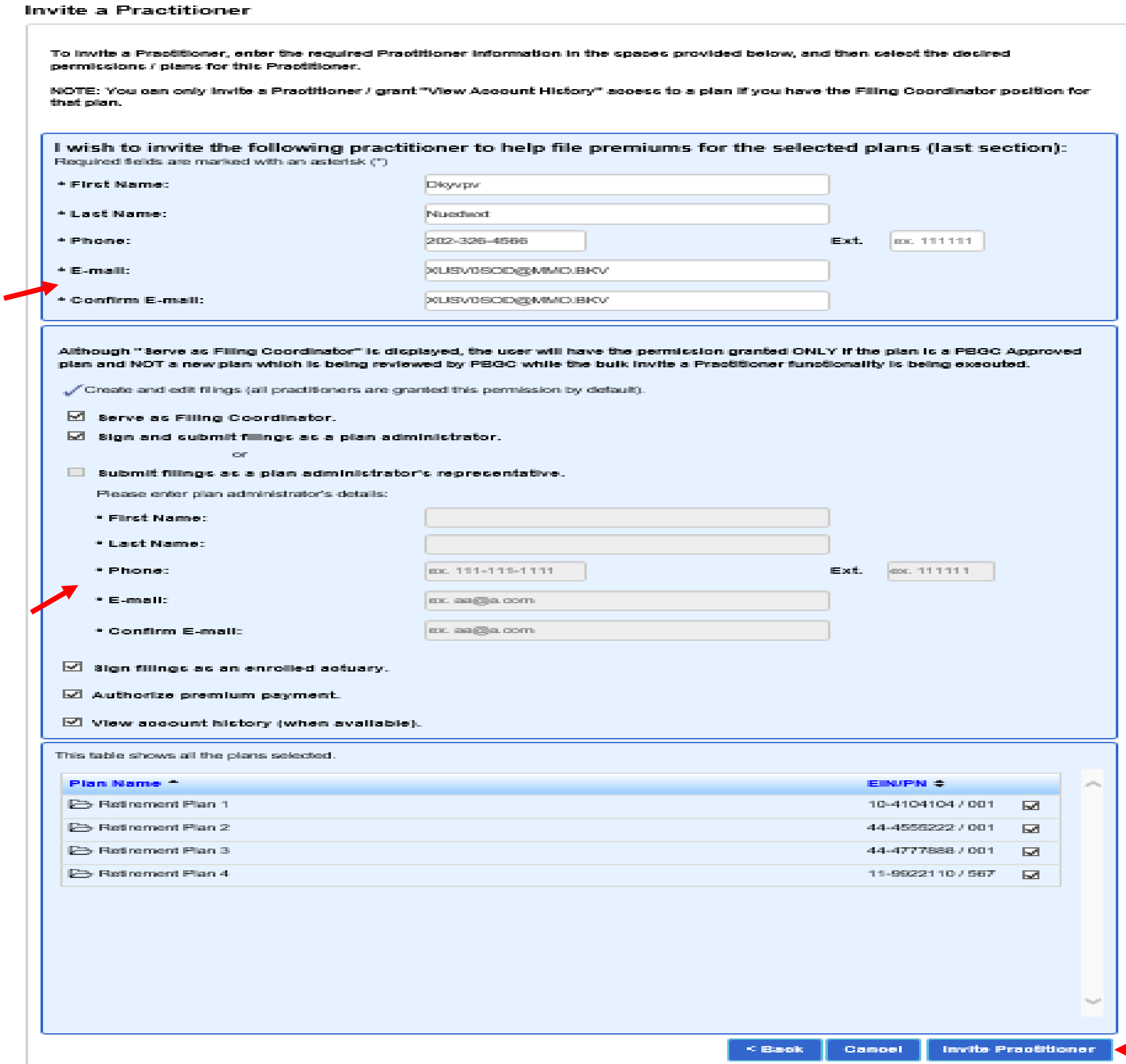
Invite a Practitioner to Multiple plans

Invite Practitioner to multiple plans

- Select the check boxes next to Account History to invite a practitioner to multiple plans and click on “Invite a Practitioner” button.
  - The Invite a Practitioner Page will be displayed (slide 6).
  - Can select up to 50 plans to invite a practitioner.



Invite a Practitioner to Multiple plans



Invite a Practitioner Page

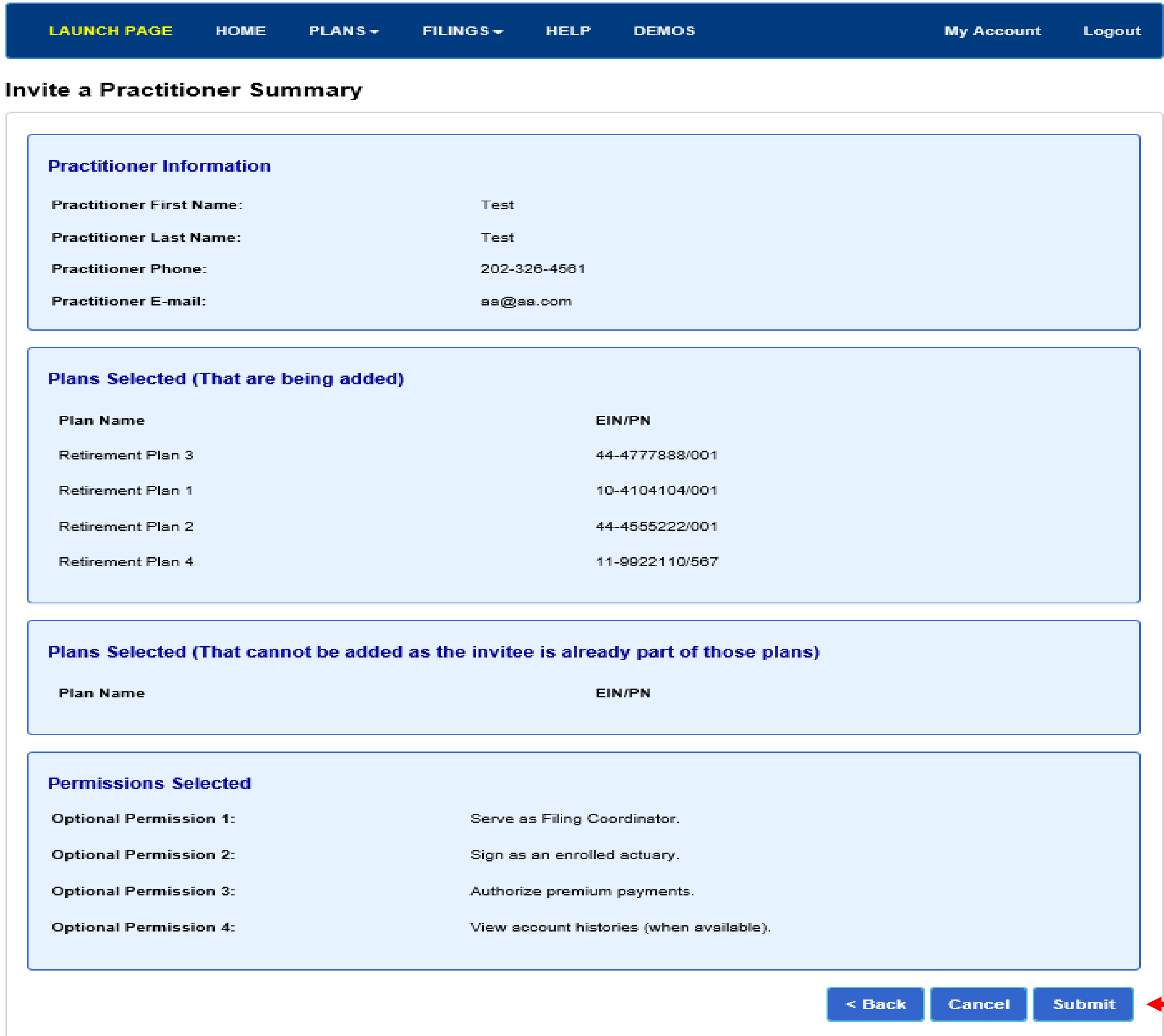
- Enter information about the Practitioner you are adding to the plan (name, work phone number, and work email address).
  - The two email fields must match to proceed.
- Select the checkbox next to each permission you are granting for the practitioner.
- Select the “Invite Practitioner” button.

Note: The **“*”** next to a field means that field is required for input.

Invite a Practitioner to Multiple plans

Invite a Practitioner Summary Page

- Verify the information on the summary page.
- Select the “Submit” button.



LAUNCH PAGE | HOME | PLANS | FILINGS | HELP | DEMOS | My Account | Logout

Invite a Practitioner Summary

Practitioner Information

Practitioner First Name:	Test
Practitioner Last Name:	Test
Practitioner Phone:	202-326-4561
Practitioner E-mail:	aa@aa.com

Plans Selected (That are being added)

Plan Name	EIN/PN
Retirement Plan 3	44-4777888/001
Retirement Plan 1	10-4104104/001
Retirement Plan 2	44-4555222/001
Retirement Plan 4	11-9922110/567

Plans Selected (That cannot be added as the invitee is already part of those plans)

Plan Name	EIN/PN

Permissions Selected

Optional Permission 1:	Serve as Filing Coordinator.
Optional Permission 2:	Sign as an enrolled actuary.
Optional Permission 3:	Authorize premium payments.
Optional Permission 4:	View account histories (when available).

< Back | Cancel | Submit

Invite a Practitioner to Multiple plans

Invite a Practitioner Confirmation Page

- This confirms that the practitioner previously set up a My PAA account and has been added to the Plan.
- Select the "Go to Plan Page" button to view the information about the newly-added practitioner.
  - The "Plan Page" will be displayed (Slide 7).

Note: If the invited Practitioner did not previously set up a My PAA account, the Confirmation Page will state that "This Practitioner's name will be displayed in the plan list only once he or she signs up for My PAA".