

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”.

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.

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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”.

My PAA (My Plan Administration Account) Launch Page

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.

Shortcuts:

- [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 or Submit a Request)
- [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](#)
- [Demo: Create a Comprehensive filing for Single-employer plan](#)
- [Demo: Create a Comprehensive filing for Multiemployer plan](#)
- [Demo: Review Plans and Correspondence in Your Account](#)
- [Demo: Submit Request, Penalty RFR or Refund](#)

Do not show this page at login

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.

PBGC My PAA Welcome, Jack Black!

LAUNCH PAGE HOME PLANS FILINGS HELP DEMOS My Account Logout

Home Page

Quick Links: Add Plan, Create Filing, Import Filing, Upload Filing

Right Now: Filings Count (In-Process) 1, You Hold 1, Others Hold 0, Plans Count 8

Plans in Jack Black's Account

View all Plans > (Red arrow)

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 (Red arrow)

Import Software-Prepared Filing(s)

Upload Software-Prepared Filing(s)

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

File Name	Comments	Conf #/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

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.

I wish to invite the following practitioner to help file premiums for Retirement Plan 4 (11-9922110 / 567):

Required fields are marked with an asterisk (*):

* First Name: Sue

* Last Name: Practitioner

* Phone: 202-222-4000 Ext. ex. 111111

* E-mail: spractitioner@workemail.com

* Confirm E-mail: spractitioner@workemail.com

I wish to grant this practitioner the following filing permissions for Pension Plan1 (44-1111111 / 444):

Create and edit filings (all practitioners are granted this permission by default).

Sign and submit filings as a plan administrator.

or

Submit filings as a plan administrator's representative.

Please enter plan administrator's details:

* First Name:

* Last Name:

* Phone: ex. 111-111-1111 Ext. ex. 111111

* E-mail: ex. aa@a.com

* Confirm E-mail: ex. aa@a.com

Sign filings as an enrolled actuary.

Authorize premium payment.

View account history (when available).

This table shows all the practitioners who can help file premiums for this plan.

Name	Permissions
Jack Black	Paying Agent, Plan Administrator, Actuary, Filing Coordinator, View Account History, Preparer

Cancel Invite Practitioner

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”.



[LAUNCH PAGE](#)

[HOME](#)

[PLANS](#) ▾

[FILINGS](#) ▾

[HELP](#)

[DEMOS](#)

[My Account](#)

[Logout](#)

Invite a Practitioner Confirmation

My PAA has sent an e-mail message to Sue Practioner with an invitation to help with electronic premium filings for Retirement Plan 4, 11-9922110 / 567.

This practitioner's name will be displayed in the plan list only once he or she signs up for My PAA. Once this happens, you will be able to edit his or her filing permissions at any time by clicking on his or her name in the plan list.

If you experience any difficulties or have additional questions you can:

- Call our toll-free practitioner number, 1-800-736-2444 (and select the "premium payment" option). Note: TTY/TDD users may call the Federal relay service toll-free at 1-800-877-8339 and ask to be connected; or
- E-mail your questions to premiums@pbgc.gov.



[Go to Plan Page](#)

[Go to Your Home Page](#)

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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).

Plan Page

Quick Links

- Premium Filings
- Plan Practitioners** (indicated by a red arrow)
- Plan Correspondence
- Submit a Request
- Check Status of Request

Plan Information

RETIREMENT PLAN 4 – 54-9686555 / 113

Plan Sponsor: Retirement Plan LLP

Plan Administrator: Retirement Plan LLP
197 Jmksj Kktg Qsqja
1493
Btkyx Pzohpu - Ykghnfwg
Secaucus, NJ 07094
US
(456) 462-7895

Plan Contact: Mr. John Doe
(134) 306-1104

Account History

Premium Filings and Payments Received by PBGC

To view the plan's Account History, ask the Filing Coordinator to add the View Account History permission to your account.

[About Account Histories](#)

Premium Filings for the Plan

Create a Filing

In-process Submitted All Filings

Filing	Confirmation #	Filing Method	Received Date	Status
2017 Comprehensive	4081780	Screen Prepared	10/3/2017 4:46:03 PM	Submitted/Successfully Processed
2016 Comprehensive*	4090373	Screen Prepared	10/6/2017 7:36:21 PM	Submitted/Successfully Processed
2016 Comprehensive	3999709	Screen Prepared	10/10/2016 11:52:00 AM	Submitted/Deleted

Premium Filing Practitioners for the Plan

Invite a Practitioner

Edit	Name	Permissions	Phone	Email	Remove Practitioner
	Jdkg Vthn	Actuary, Preparer, View Account History	488-705-1805	TTDR.CTFA@U.FYDxpbgc	
	Jack Black	Preparer, Filing Coordinator	202-326-4000	MAIL@MAIL.COM	
	Ypngof Mgeqgj	Preparer, Actuary, View Account History	413-726-2023	RZUQXZ.INWC0Y@HZ.YFGxpbgc	
	Ksgqthk Rwn	Paying Agent, View Account History, Preparer, Filing Coordinator, Plan Administrator	637-882-1777	VITLLVF.GLB@KP.ZPGxpbgc	
	Celzqj Erjro	Plan Administrator, Paying Agent, Preparer, View Account History, Filing Coordinator	456-462-7895	YBPAHTV.WUAA@YZ.IAPxpbgc	

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.

All Plans in Jack Black's Account

[Instructions](#)
[Print this page](#)

Active Plans

Plan Name / EIN

Plan Name ^	EIN/PN v	Actions	View Account History
<input type="checkbox"/> Retirement Plan 1	10-4104104 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 2	44-4555222 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 3	44-4777888 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 4	11-9922110 / 567	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>

Archived Plans

Plan Name / EIN

Plan Name ^	EIN/PN v	Actions	View Account History
<input type="checkbox"/> Retirement Plan 5	10-2102102 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 6	65-0425084 / 002	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 7	10-3103103 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 8	74-2980802 / 231	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>

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 invite a Practitioner, enter the required Practitioner information in the spaces provided below, and then select the desired permissions / plans for this Practitioner.

NOTE: You can only invite a Practitioner / grant "View Account History" access to a plan if you have the Filing Coordinator position for that plan.

I wish to invite the following practitioner to help file premiums for the selected plans (last section):
Required fields are marked with an asterisk (*)

+ First Name:
+ Last Name:
+ Phone: Ext.
+ E-mail:
+ Confirm E-mail:

Although "Serve as Filing Coordinator" is displayed, the user will have the permission granted ONLY if the plan is a PBGC Approved plan and NOT a new plan which is being reviewed by PBGC while the bulk invite a Practitioner functionality is being executed.

Create and edit filings (all practitioners are granted this permission by default).

Serve as Filing Coordinator.
 Sign and submit filings as a plan administrator.
or
 Submit filings as a plan administrator's representative.

Please enter plan administrator's details:

+ First Name:
+ Last Name:
+ Phone: Ext.
+ E-mail:
+ Confirm E-mail:

Sign filings as an enrolled actuary.
 Authorize premium payment.
 View account history (when available).

This table shows all the plans selected.

Plan Name	EIN/IDN	
Retirement Plan 1	10-4104104 / 001	<input checked="" type="checkbox"/>
Retirement Plan 2	44-4555222 / 001	<input checked="" type="checkbox"/>
Retirement Plan 3	44-4777888 / 001	<input checked="" type="checkbox"/>
Retirement Plan 4	15-9922110 / 567	<input checked="" type="checkbox"/>

< Back Cancel Invite Practitioner

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
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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”.

Invite a Practitioner Confirmation

My PAA has sent an e-mail message to Dkyvpv Nuedwxt with an invitation to help with electronic premium filings for the following plans:

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

Since this practitioner has already signed up for My PAA, his or her name should now be displayed in the plan list. You can edit this practitioner’s filing permissions at any time by clicking on his or her name in the plan list.

If you experience any difficulties or have additional questions you can:

- Call our toll-free practitioner number, 1-800-736-2444 (and select the "premium payment" option). Note: TTY/TDD users may call the Federal relay service toll-free at 1-800-877-8339 and ask to be connected; or
- E-mail your questions to premiums@pbgc.gov.

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