

# **My Plan Administration Account (My PAA) Create a Comprehensive Filing for a Multiemployer Plan**



Pension Benefit Guaranty Corporation  
Protecting America's Pensions

# Create a Comprehensive Filing for a Multiemployer Plan

## 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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# Create a Comprehensive Filing for a Multiemployer Plan

## Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the “Create a Filing” link in the Returning User section.
  - ❖ The All Plans in Your Account Page will be displayed (Slide 5).
- 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**

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

# Create a Comprehensive Filing for a Multiemployer Plan

## From the Home Page

- Select the “Create a Filing” link for the appropriate plan in the Plans in Your Account section.
  - ❖ The “How to File” page will be displayed (Slide 6).
- If necessary, select the “View all Plans” link to see all of your plans (Slide 5).

Note 1: To successfully create a comprehensive filing, the plan must be in the “Plans in Your Account” section.

Note 2: You can search or sort the columns to find a particular plan.

Note 3: 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!

**LAUNCH PAGE** HOME PLANS FILINGS HELP DEMOS 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 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

### 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

# Create a Comprehensive Filing for a Multiemployer Plan

## From the All Plans in Your Account Page

- Select the “Create a Filing” link for the appropriate plan.
  - ❖ The “How to File” page will be displayed (Slide 6).

Note: You can search or sort the columns to find a particular plan.

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### All Plans in Jack Black's Account

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

#### Active Plans

[Search](#) [Clear Search](#) [Move to Archived Plans](#)

Plan Name ▲	EIN/PN ▼	Actions	View Account History
<a href="#">Retirement Plan 1</a>	10-4104104 / 001	<a href="#">Create a Filing</a>	<a href="#">Account History</a> <input type="checkbox"/>
<a href="#">Retirement Plan 2</a>	44-4555222 / 001	<a href="#">Create a Filing</a>	<a href="#">Account History</a> <input type="checkbox"/>
<a href="#">Retirement Plan 3</a>	44-4777888 / 001	<a href="#">Create a Filing</a>	<a href="#">Account History</a> <input type="checkbox"/>
<a href="#">Retirement Plan 4</a>	55-6666666 / 777	<a href="#">Create a Filing</a>	<a href="#">Account History</a> <input type="checkbox"/>

#### Archived Plans

[Search](#) [Clear Search](#) [Move to Active Plans](#)

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

# Create a Comprehensive Filing for a Multiemployer Plan

## How to File Page

### ➤ Identify Filing Type:

- ❖ Select the “Continue” button to create a Comprehensive Premium Filing (plan years 2008 and later).



## How to File

Online filing with My PAA is a 4-step process:

[➤ More Details](#)

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

Click the continue button below to create a Comprehensive Premium Filing (plan years 2008 and later).  
To submit a filing for plan years 1997 - 2007, click [HERE](#) to access prior year filing forms and instructions. For filings before 1997, please contact the Premium Customer Service Center via email ([premiums@pbgc.gov](mailto:premiums@pbgc.gov)) or 1-800-736-2444 and select option "2" for premiums.

Comprehensive Premium Filing (2008 and later)

Cancel

Continue

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# Create a Comprehensive Filing for a Multiemployer Plan

## Step 1: Start a Draft Filing Page

### ➤ Identify Filing to be Made:

- ❖ Enter or select the appropriate information for the filing, e.g., plan year beginning and ending dates and multiemployer plan.
- ❖ Select the “Continue” button to go to the next screen.



### Step 1: Start a Draft Filing

Retirement Plan 4 – 55-6666666 / 777

Please note: You will be automatically logged out of My PAA after 20 minutes of inactivity. This could result in a loss of any information you entered in My PAA. [View Account History](#)



### Identify Filing to be Made

[Cancel](#) [Continue >](#)

[Instructions](#)

Premium is for plan year commencing:  Premium is for plan year ending:

If the plan year commencement date has changed since the most recent PBGC filing as a result of a plan amendment changing the plan year, enter the date the plan year change was adopted.

☐ This is an amended filing

[Instructions](#)

☒ Multiemployer plan or ☐ Single-employer plan  
(Includes Multiple-employer plan)

[Instructions](#)

Comprehensive Premium Filing

[Instructions](#)

**Proration**  
☐ Check box if plan qualifies to pay a prorated premium for this premium payment year (i.e., if plan has less than a full year of coverage).

**Plan size**  
For the premium payment year, is the plan a "small" plan? ☐ Yes ☒ No

[Cancel](#) [Continue >](#)

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# Create a Comprehensive Filing for a Multiemployer Plan

## Step 1: Start a Draft Filing Page

### ➤ Enter Plan Information:

- ❖ Enter or select the appropriate information for the filing, e.g., plan name and effective date.
- ❖ Select the “Back” button to review or change your previous entries.
- ❖ Select the “Continue” button to go to the next screen.

**PBGC My PAA**

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### Step 1: Start a Draft Filing

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777 [View Account History](#)

#### Enter Plan Information

[< Back](#) [Cancel](#) [Continue >](#)

[Instructions](#)

Plan name: Retirement Plan 4

Plan effective date: 01/01/2015

☐ Check box if plan is a new or newly covered plan and provide the following information: [Instructions](#)

Adoption Date: MM/DD/YYYY

Date coverage began on: MM/DD/YYYY

Is the plan a "continuation plan"? ☐ Yes ☐ No

Previous filing EIN: 55-6666666 Previous filing PN: 777

Current EIN: 55-6666666 Current PN: 777

**Form 5500 EIN and PN Information:**  
If the EIN and PN are not both the same as on the 2014 Form 5500, enter EIN and PN from 2014 Form 5500 and provide explanation:

EIN: ex. 11-1111111 PN: ex. 111

256/256 characters remaining

Character Limit 256

[< Back](#) [Cancel](#) [Continue >](#)

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# Create a Comprehensive Filing for a Multiemployer Plan

## Step 1: Start a Draft Filing Page

### ➤ Enter Filing information

- ❖ Enter or select the appropriate information for the filing, e.g., business code and CUSIP number.
- ❖ Select the “Back” button to review or change your previous entries.
- ❖ Select the “Continue” button to go to the next screen.



### Step 1: Start a Draft Filing

[View Account History](#)

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777

#### Enter Filing Information

< Back   Cancel   Continue >

6-digit business code:  [Instructions](#)

First 6 digits of CUSIP number:  [Instructions](#)

Disaster Relief (enter code):  [Instructions](#)  
(For Disaster Relief Announcements, [click here](#))

< Back   Cancel   Continue >

# Create a Comprehensive Filing for a Multiemployer Plan

## Step 1: Start a Draft Filing Page

### ➤ Enter Plan Sponsor and Administrator Information:

- ❖ Enter or select the appropriate information for the filing, e.g., plan sponsor name.
- ❖ Select the “Back” button to review or change your previous entries.
- ❖ Select the “Continue” button to go to the next screen.

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### Step 1: Start a Draft Filing

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777 [View Account History](#)

**Enter Plan Sponsor and Administrator Information**

[< Back](#) [Cancel](#) [Continue >](#)

**Plan Sponsor Information** [Instructions](#)

Name:

**Plan Administrator Information** [Instructions](#)

Name:

Address:

City:  State:  Zip:

Country:

**Contact Person**

Name (for "attention" line of mailings):

Phone:  Ext:

E-mail:

**Alternate phone number for Insured Plans List on pbgc.gov:**

Alternative Phone:  Ext:

**Additional Plan Contact (optional)** [Instructions](#)

Name:

Phone:  Ext:

E-mail:

[< Back](#) [Cancel](#) [Continue >](#)

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# Create a Comprehensive Filing for a Multiemployer Plan

## Step 1: Start a Draft Filing Page

### ➤ Calculate Total Premium Payment:

- ❖ Enter or select the appropriate information for the filing, e.g., participant count date and the participant counts.
- ❖ Select the “Calculate” buttons.
- ❖ Select the “Back” button to review or change your previous entries.
- ❖ Select the “Continue” button to go to the next screen.

Note: Starting with this page, you can select the “Save & Exit” button to save the filing and logout of My PAA.



### Step 1: Start a Draft Filing

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777

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

**Calculate Total Premium Payment**

< Back Cancel Continue > Save & Exit

Participant Count Date: 01/01/2015  
Multiemployer Flat-rate: \$26.00  
Participant Count as of Participant Count Date:  
Active: 800  
Terminated Vested: 20  
Retirees and Beneficiaries: 100  
Total Participant Count: = 920  
Total Premium: = \$23,920.00 **Calculate**

**Premium Credit**

Payments made previously for this premium payment year: \$ 2000  
Outstanding credit from the plan year immediately preceding the premium payment year: + \$ 400  
Total Premium Credit: - \$2,400.00 **Calculate**  
Amount Due: = \$21,520.00 **Calculate**

< Back Cancel Continue > Save & Exit

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# Create a Comprehensive Filing for a Multiemployer Plan

## Step 1: Start a Draft Filing Page

### ➤ Report Miscellaneous Information:

- ❖ Enter or select the appropriate information for the filing, e.g., if this is a final filing.
- ❖ Select the “Back” button to review or change your previous entries.
- ❖ Select the “Continue” button to go to the next screen.

**PBGC My PAA**

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**Step 1: Start a Draft Filing**

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777 [View Account History](#)

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

**Report Miscellaneous Information**

< Back Cancel Continue > Save & Exit

**Final Filing**  
If this is the last filing for this plan, enter the date of event and select the reason that best describes why filing obligation is ceasing:  
MM/DD/YYYY  
☐ Merger/Consolidation ☐ Distribution pursuant to termination  
☐ Trusteeship ☐ Cessation of covered status

**Participation Freeze**  
If, as of the beginning of the premium payment year, this plan is closed to new entrants, enter the date the plan became closed to new entrants:  
MM/DD/YYYY

**Accrual Freeze**  
If, as of the beginning of the premium payment year, benefit accruals under this plan are partially or totally frozen, enter the date the freeze became effective and select the reason that best describes the nature of the freeze:  
MM/DD/YYYY  
☐ For all participants, both pay and service are frozen  
☐ For some participants, both pay and service are frozen  
☐ For all participants, service is frozen, pay is not  
☐ For some participants, service is frozen, pay is not  
☐ Other (enter explanation)

4000/4000 characters remaining

Limit 4,000

**Risk Transfer Activity**  
Do not complete this item if this is the last filing for this plan

a. Lump sum windows: If the plan provided one or more Lump Sum Windows during the time period described in the instructions, report the number of persons eligible to elect a lump sum under any such window and the number who elected a lump sum:  
(1) Persons not in pay status when lump sum was offered:  
Eligible to elect lump sum Elected lump sum  
(2) Persons in pay status when lump sum was offered:  
Eligible to elect lump sum Elected lump sum

b. Annuity purchases: If, during the time period described in the instructions, the plan purchased annuities for a group of people, report the number of persons for whom an annuity was purchased:  
(1) Persons not in pay status when annuity was purchased:  
(2) Persons in pay status when annuity was purchased:

< Back Cancel Continue > Save & Exit

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# Create a Comprehensive Filing for a Multiemployer Plan

## Step 1: Start a Draft Filing Page

- Report Transfers From Other Plans:
  - ❖ Enter or select the appropriate information for the filing, e.g., employer identification number and plan number.
  - ❖ Select the “Back” button to review or change your previous entries.
  - ❖ Select the “Continue” button to go to the next screen.



### Step 1: Start a Draft Filing

[View Account History](#)

**Comprehensive Filing for Plan Year Commencing 1/1/2015**  
**Retirement Plan 4 – 55-6666666 / 777**

1

2

3

4

Start a Draft Filing    Edit Draft, Sign Filing, and Select Payment Alternative    Submit Filing with Payment (if any)    Receive Filing Confirmation

**Report Transfers From Other Plans**

[< Back](#)   [Cancel](#)   [Continue >](#)   [Save & Exit](#)

[Instructions](#)

Transfers **from** other plans — If another plan transferred assets or liabilities to this plan since the most recent comprehensive premium filing, provide the following information with respect to each plan from which the assets or liabilities were transferred (if transfer involved a new or newly-covered plan, see instructions).

[Clear all rows](#)

EIN (ex. 11-1111111)	PN (ex. 111)	Date of transfer (ex. MM/DD/YYYY)	Type of transfer	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>

[Add more rows](#)

[< Back](#)   [Cancel](#)   [Continue >](#)   [Save & Exit](#)



# Create a Comprehensive Filing for a Multiemployer Plan

## Step 1: Start a Draft Filing Page

### ➤ Report Transfers To Other Plans:

- ❖ Enter or select the appropriate information for the filing, e.g., employer identification number and plan number.
- ❖ Select the “Back” button to review or change your previous entries.
- ❖ Select the “Continue” button to go to the next screen.



### Step 1: Start a Draft Filing

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777 [View Account History](#)

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

#### Report Transfers To Other Plans

< Back Cancel Continue > Save & Exit

[Instructions](#)

Transfers to other plans — If this plan transferred assets or liabilities to another plan since the most recent comprehensive premium filing, provide the following information with respect to each plan to which the assets or liabilities were transferred (if transfer involved a new or newly-covered plan, see instructions).

[Clear all rows](#)

EIN (ex. 11-1111111)	PN (ex. 111)	Date of Transfer (ex. MM/DD/YYYY)	Type of transfer	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Merger <input type="radio"/> Consolidation <input type="radio"/> Spinoff <input type="radio"/> Other	<a href="#">Clear</a>

[Add more rows](#)

< Back Cancel Continue > Save & Exit

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# Create a Comprehensive Filing for a Multiemployer Plan

## 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 “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 1: Start a Draft Filing

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan 4 – 55-6666666 / 777

[Print this Page](#)  
[View Printable Form](#)  
[View Account History](#)



### Data Summary

Save Filing and Proceed to Step 2

[Cancel](#) [Continue >](#)

Please verify that all information is correct. To change information, click 'Edit'. If you are satisfied and do not need to make any changes, click '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: Multiemployer  
Filing Type: Comprehensive  
Plan qualifies for proration: Not Checked  
Plan size (small plan): No

#### Enter Plan Information

[Edit](#)

Plan Name: Retirement Plan3  
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: 44-5555555 / 777  
Current EIN / PN: 44-5555555 / 777  
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: 111115  
First 6 digits of CUSIP number: N/A  
Disaster Relief Code: N/A

# Create a Comprehensive Filing for a Multiemployer Plan

## Draft Filing Saved but Not Submitted Page

- Review the information on this page about the status of your saved filing.
- Select the “Go to Filing Manager” button to continue to step 2 of the filing process (Slide 17).

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## Draft Filing Saved but not Submitted

You have completed step 1 of the 4 step filing process

Click the 'Go to Filing Manager' button to continue with step 2.

You have created and saved a DRAFT filing for Retirement Plan 4, 55-6666666 / 777 -- this completes step 1 of the filing process.

You must complete all 4 steps to finish the submission process. These steps are initiated from the Filing Manager Page.

Click the 'Go to Filing Manager' button to continue.

Note: For a premium filing to be considered timely, both the filing and the payment of any associated premium must be filed by the due date.

[Go to Filing Manager](#)

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# Create a Comprehensive Filing for a Multiemployer Plan

## Filing Manager Page

- The top of the page shows that you are now on step 2 of the filing process; “Edit Draft, Sign Filing, and Select Payment Alternative”.
- Use the Filing Manager page to review, edit, sign, pay, attach a supplement PDF and submit the filing. See the demo “Review, Edit, Route, and Sign a filing”.
- Select the appropriate link/button to logout or to go to another page (e.g., the Plan Page).

The screenshot displays the Filing Manager page for Retirement Plan 4 - 55-6666666 / 777. The top navigation bar includes links for LAUNCH PAGE, HOME, PLANS, FILINGS, HELP, and DEMOS, along with My Account and Logout. A red arrow points to the Logout link. Below the navigation bar, the page title is "Step 2: Edit Draft, Sign Filing, and Select Payment Alternative" with a link to View Account History. A progress bar shows four steps: 1. Start a Draft Filing, 2. Edit Draft, Sign Filing, and Select Payment Alternative (current step), 3. Submit Filing with Payment (if any), and 4. Receive Filing Confirmation. Below the progress bar, the Filing Manager section includes a "Go to Plan Page" button, indicated by a red arrow. The Filing Status section shows the filing is "ready for submission" with buttons for "Submit Now" and "Submit Later". A note below states: "Note: Click the 'submit now' button only once or you may encounter an error." The Filing Task List section includes buttons for "View/Edit Filing", "Delete Filing", "Edit E-Payment", and "Attach File" (indicated by a red arrow). The task list shows three tasks: "This filing has the required information but will undergo additional validations upon submission. Please click the View Filing button to review the accuracy of the data before the filing is submitted.", "Plan Administrator or PA Representative e-signature completed 12:57 PM, 4/1/2016 Eastern Time" with a "Remove Signature" link, and "Enrolled Actuary e-signature completed 12:58 PM, 4/1/2016 Eastern Time" with a "Remove Signature" link. Below these, it shows "Authorization for payment alternative completed" with "Payment alternative selected: Other" and "4:26 PM, 4/12/2016 Eastern Time".

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

Step 2: Edit Draft, Sign Filing, and Select Payment Alternative [View Account History](#)

Retirement Plan 4 - 55-6666666 / 777

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

**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](#)

[View/Edit Filing](#) ☒ This filing has the required information but will undergo additional validations upon submission. Please click the View Filing button to review the accuracy of the data before the filing is submitted. [Delete Filing](#)

☒ Plan Administrator or PA Representative e-signature completed 12:57 PM, 4/1/2016 Eastern Time [Remove Signature](#)

☒ Enrolled Actuary e-signature completed 12:58 PM, 4/1/2016 Eastern Time [Remove Signature](#)

[Edit E-Payment](#) ☒ Authorization for payment alternative completed  
Payment alternative selected: Other  
4:26 PM, 4/12/2016 Eastern Time

[Attach File](#)

**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 Filing Status must show that the filing is ready for submission.
- Each required signature/authorization on the task list must be completed.
- Review all warnings and the accuracy of the data before submission.
- Click a "Submit" button.

