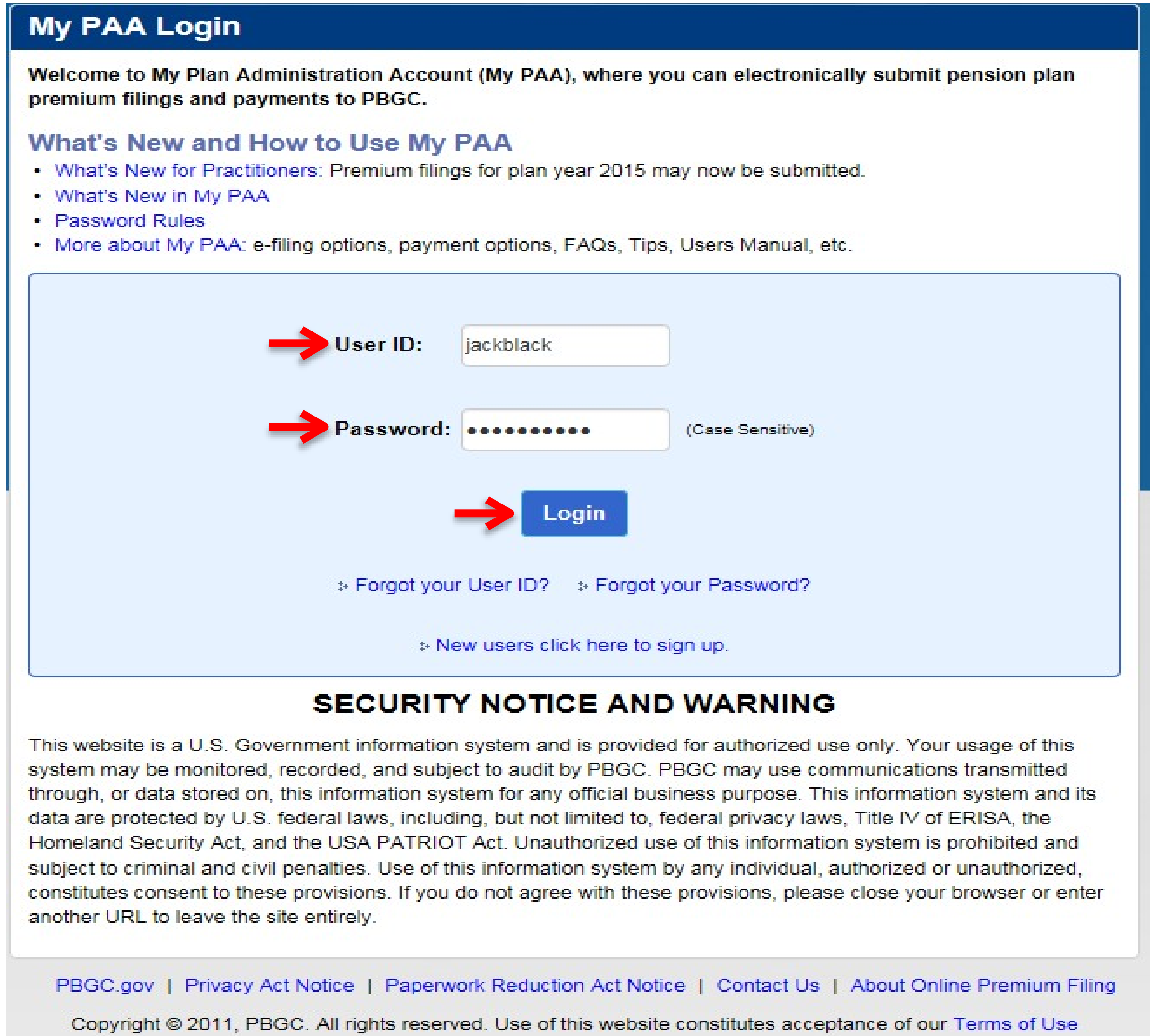
My Plan Administration Account (My PAA) Create a Comprehensive Filing for a Multiemployer Plan

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".

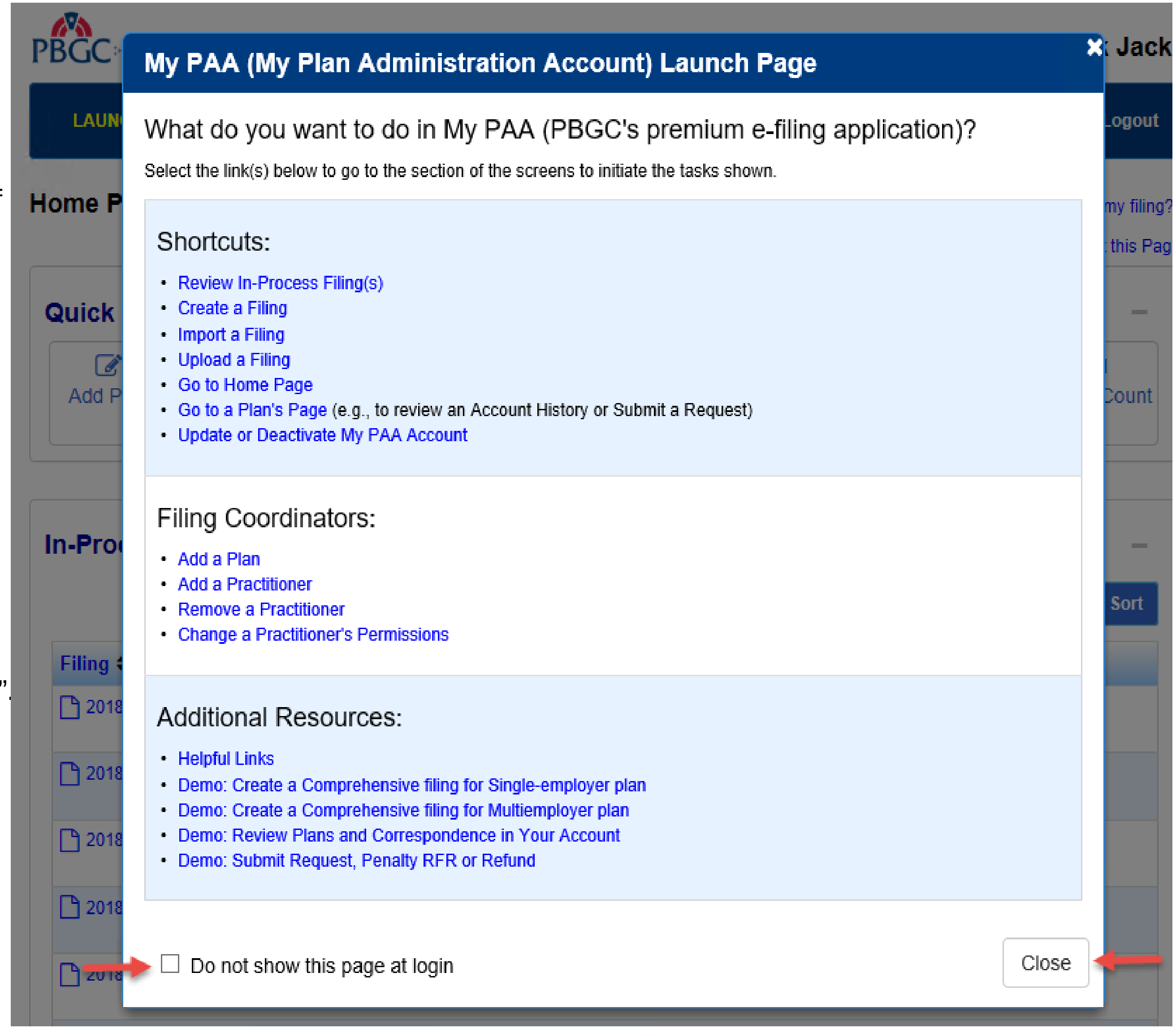


Create a Comprehensive Filing for a Multiemployer Plan

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".



Create a Comprehensive Filing for a Multiemployer Plan

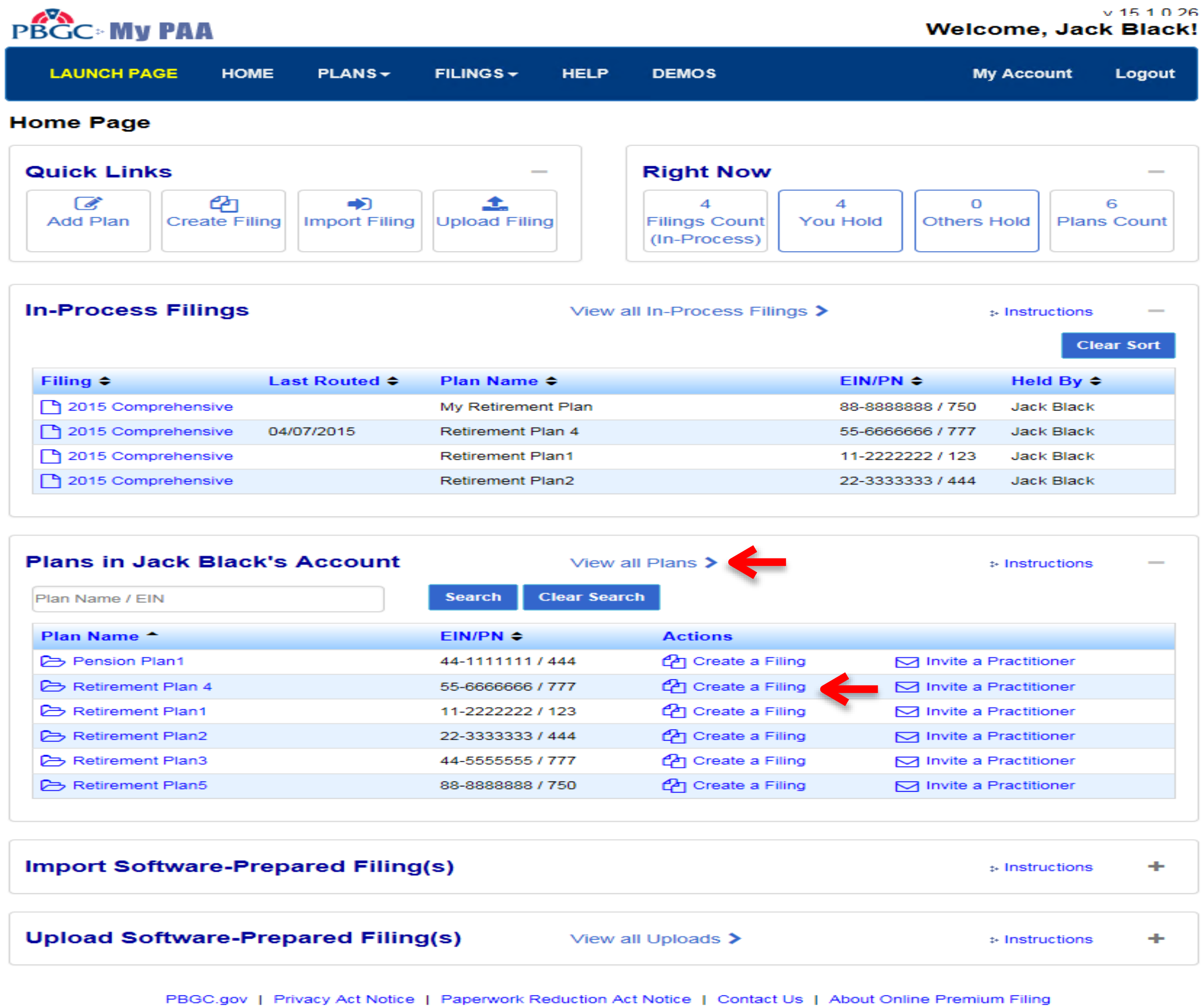
From the Home Page

- 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.

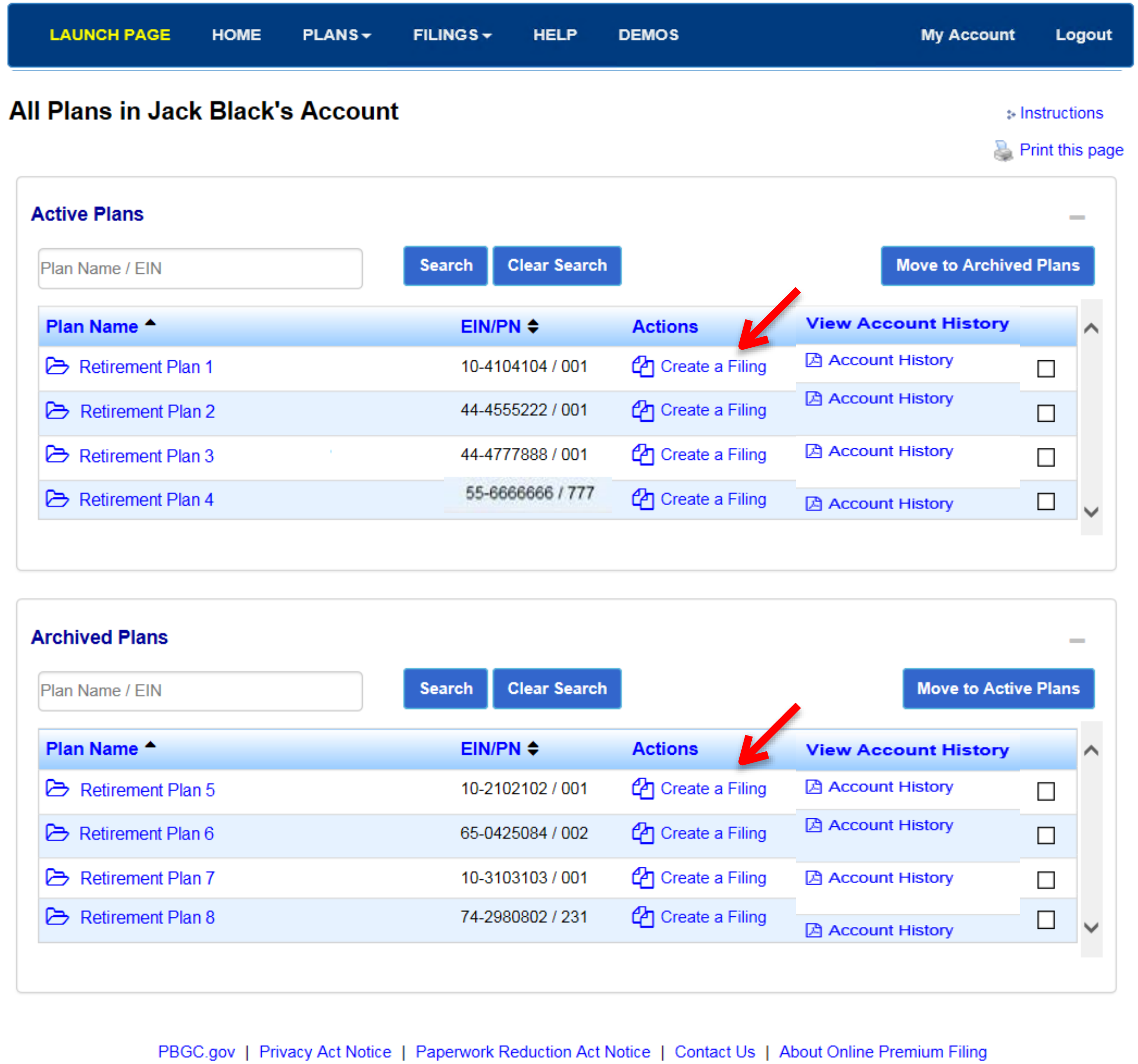


Create a Comprehensive Filing for a Multiemployer Plan

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).

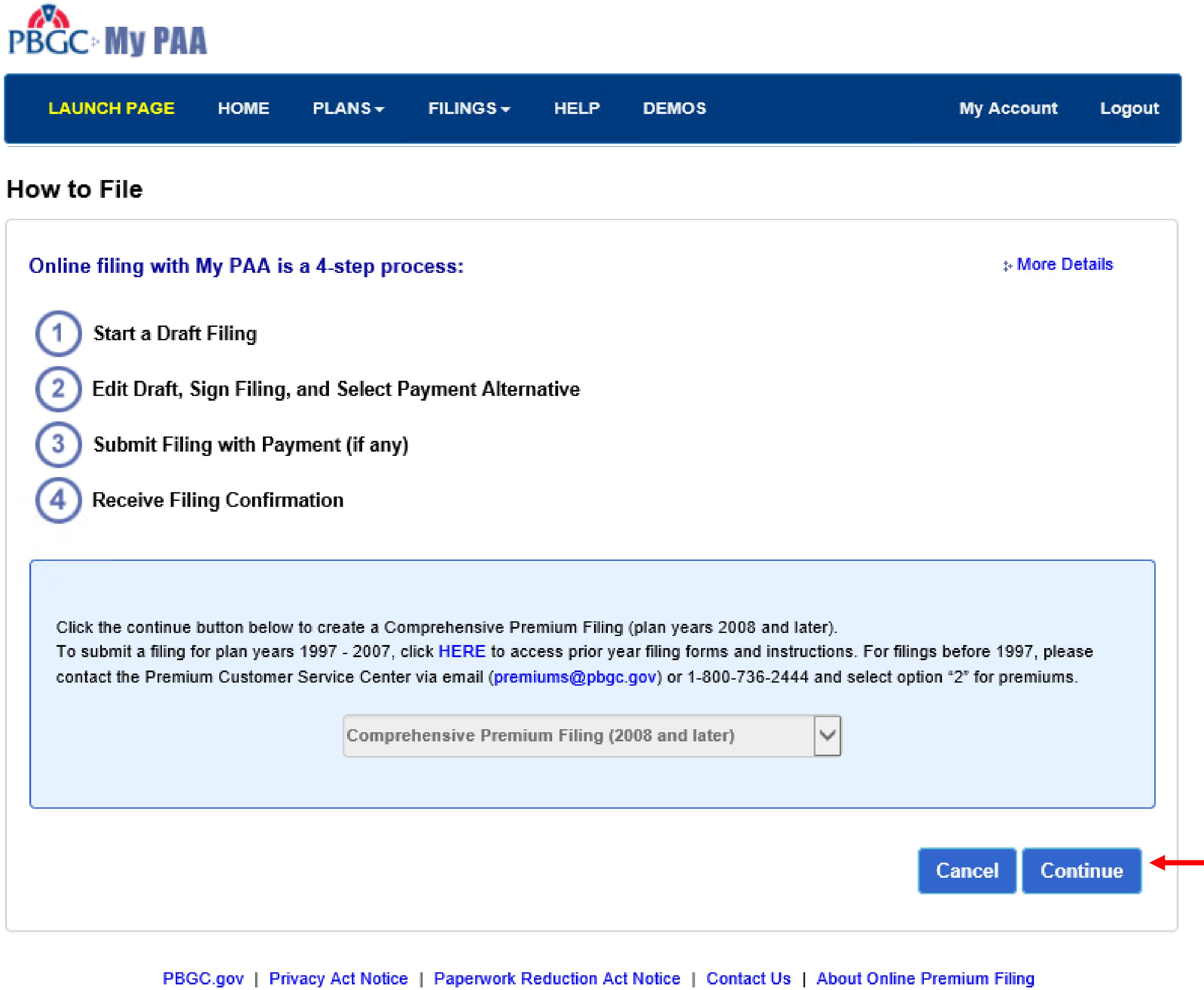
Note: You can search or sort the columns to find a particular plan.



Create a Comprehensive Filing for a Multiemployer Plan

How to File Page

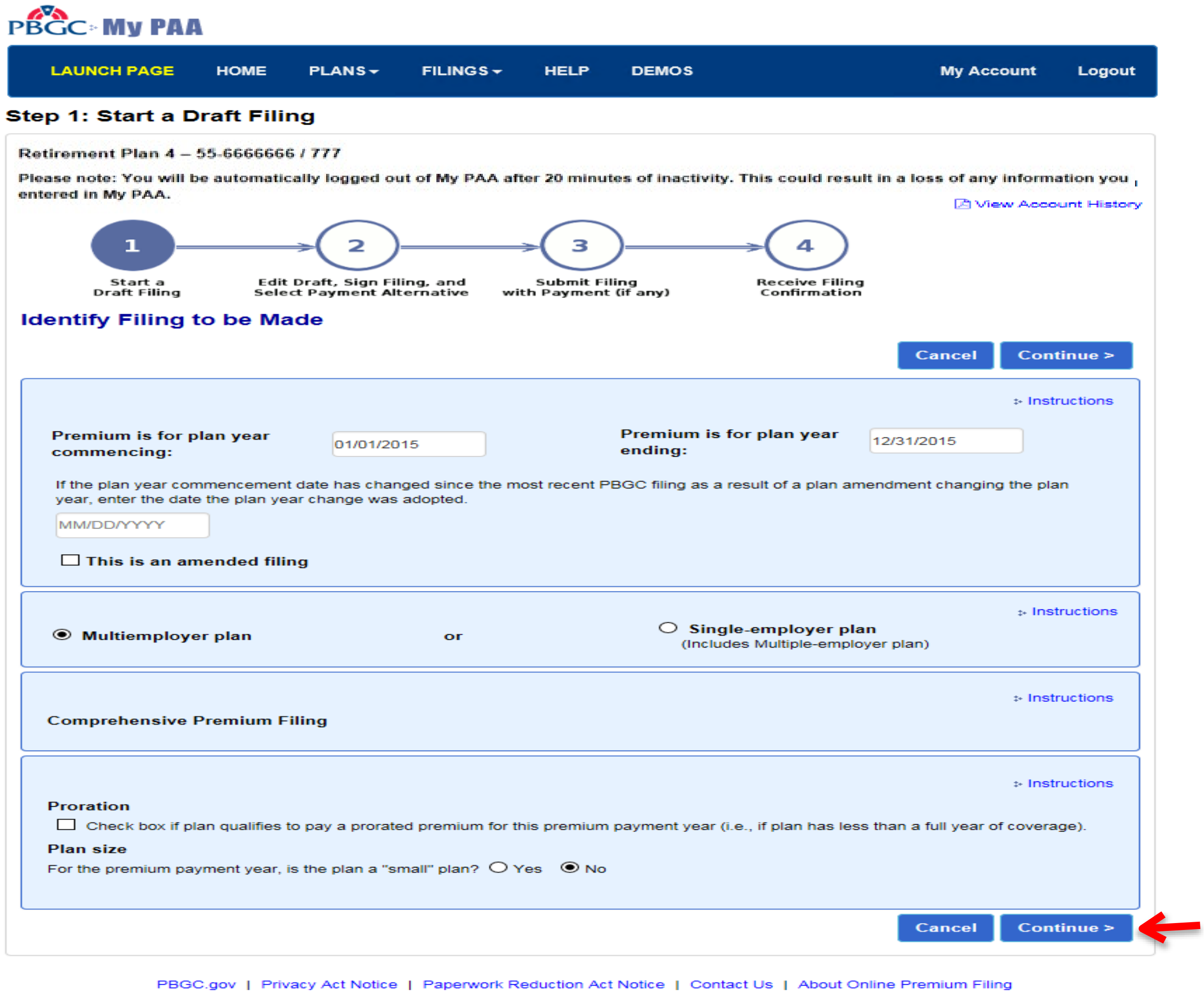
- Identify Filing Type:
  - Select the "Continue" button to create a Comprehensive Premium Filing (plan years 2008 and later).



Create a Comprehensive Filing for a Multiemployer Plan

Step 1: Start a Draft Filing Page

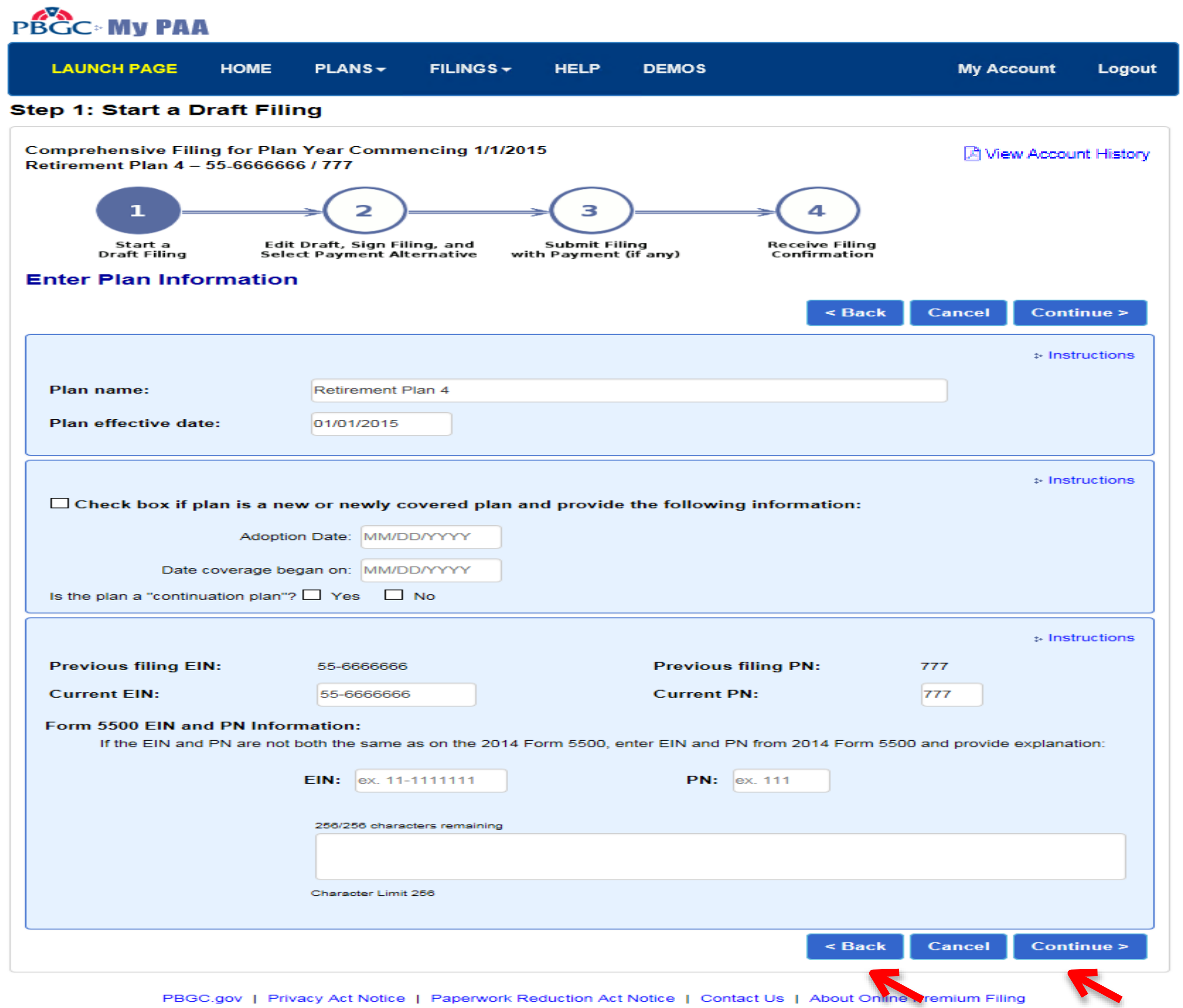
- Identify Filing to be Made:
  - Enter or select the appropriate information for the filing, e.g., plan year beginning and ending dates and multiemployer plan.
  - Select the “Continue” button to go to the next screen.



Create a Comprehensive Filing for a Multiemployer Plan

Step 1: Start a Draft Filing Page

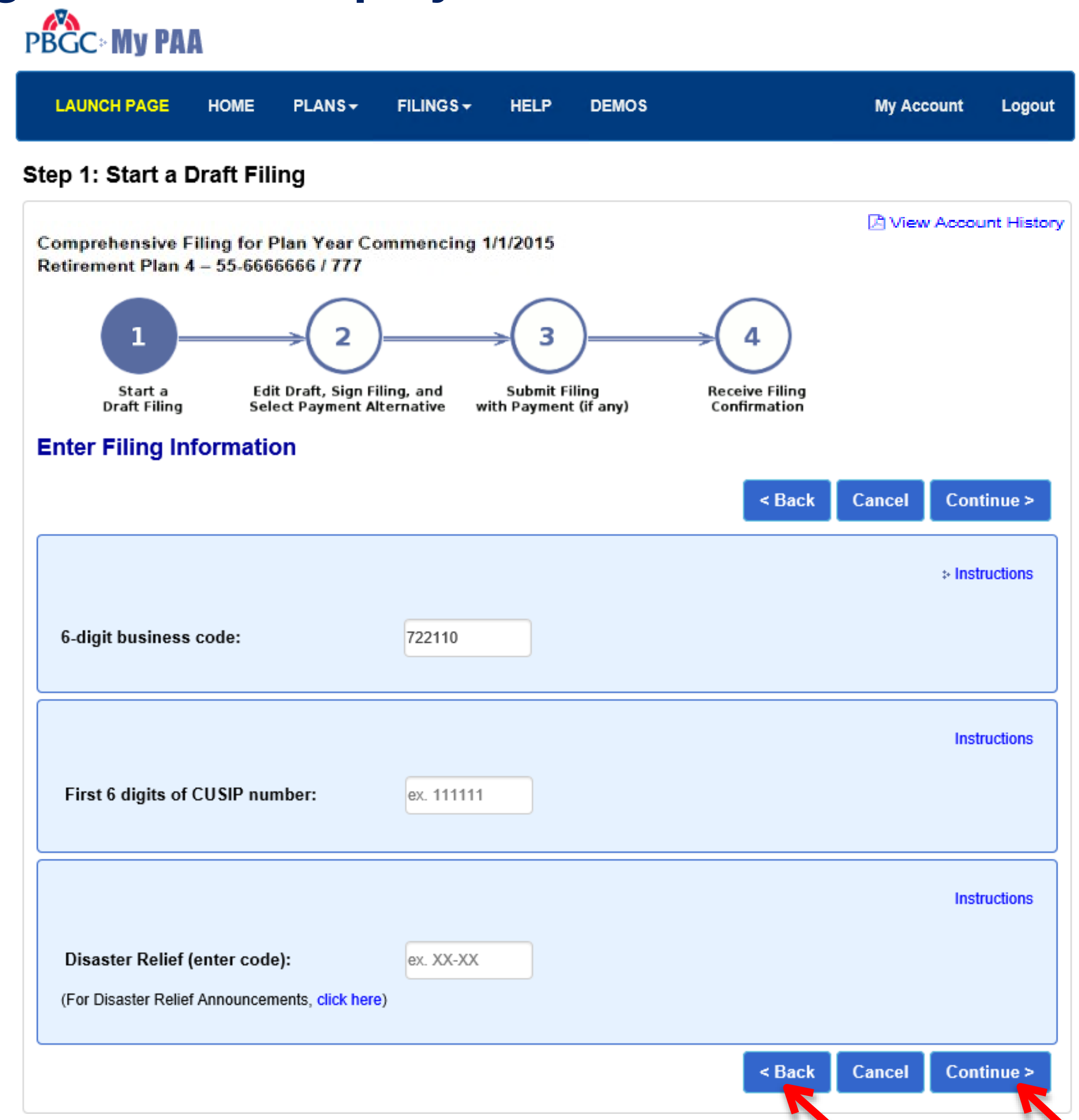
- Enter Plan Information:
  - Enter or select the appropriate information for the filing, e.g., plan name and effective date.
  - Select the “Back” button to review or change your previous entries.
  - Select the “Continue” button to go to the next screen.



Create a Comprehensive Filing for a Multiemployer Plan

Step 1: Start a Draft Filing Page

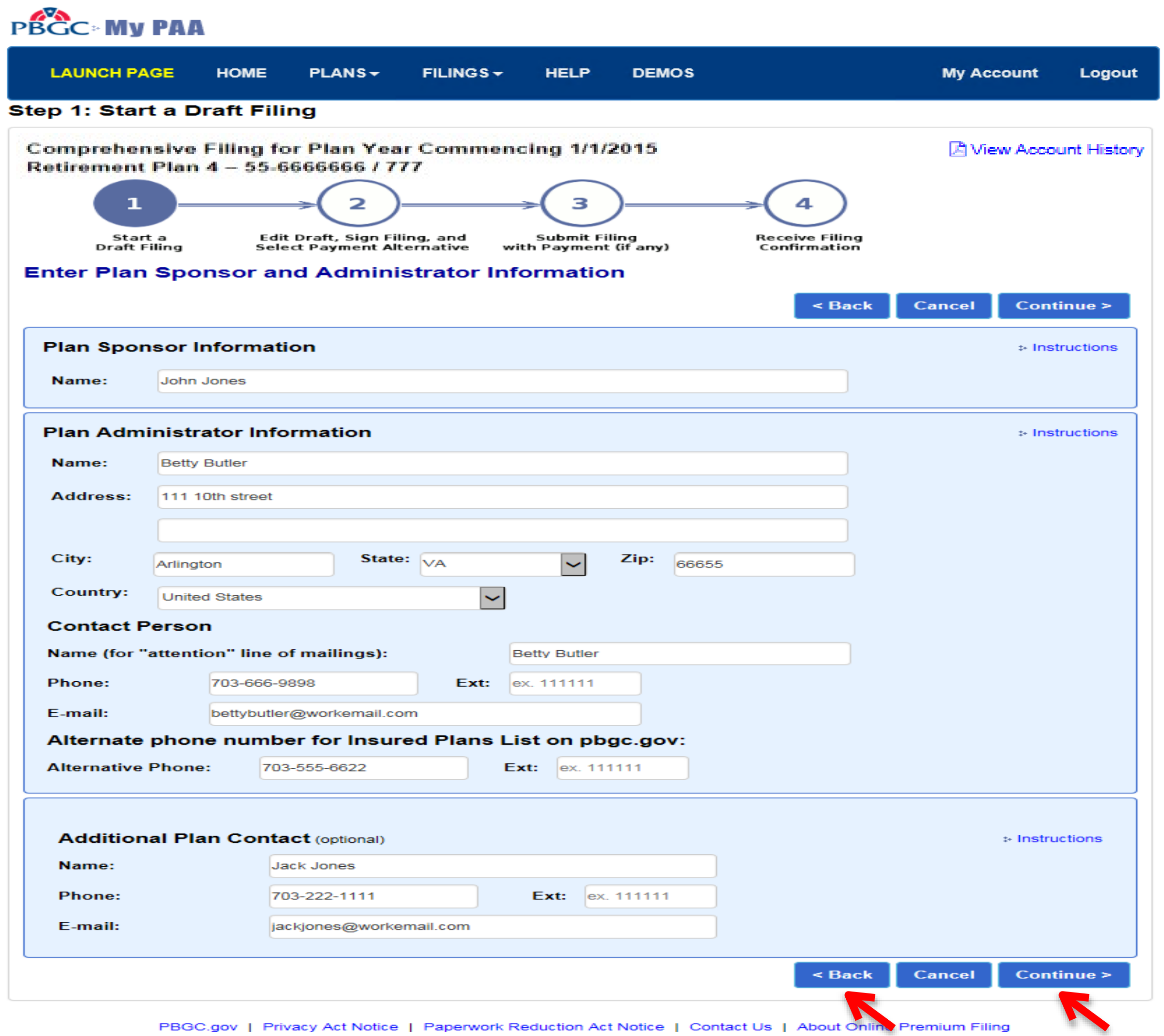
- Enter Filing information
  - Enter or select the appropriate information for the filing, e.g., business code and CUSIP number.
  - Select the “Back” button to review or change your previous entries.
  - Select the “Continue” button to go to the next screen.



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.

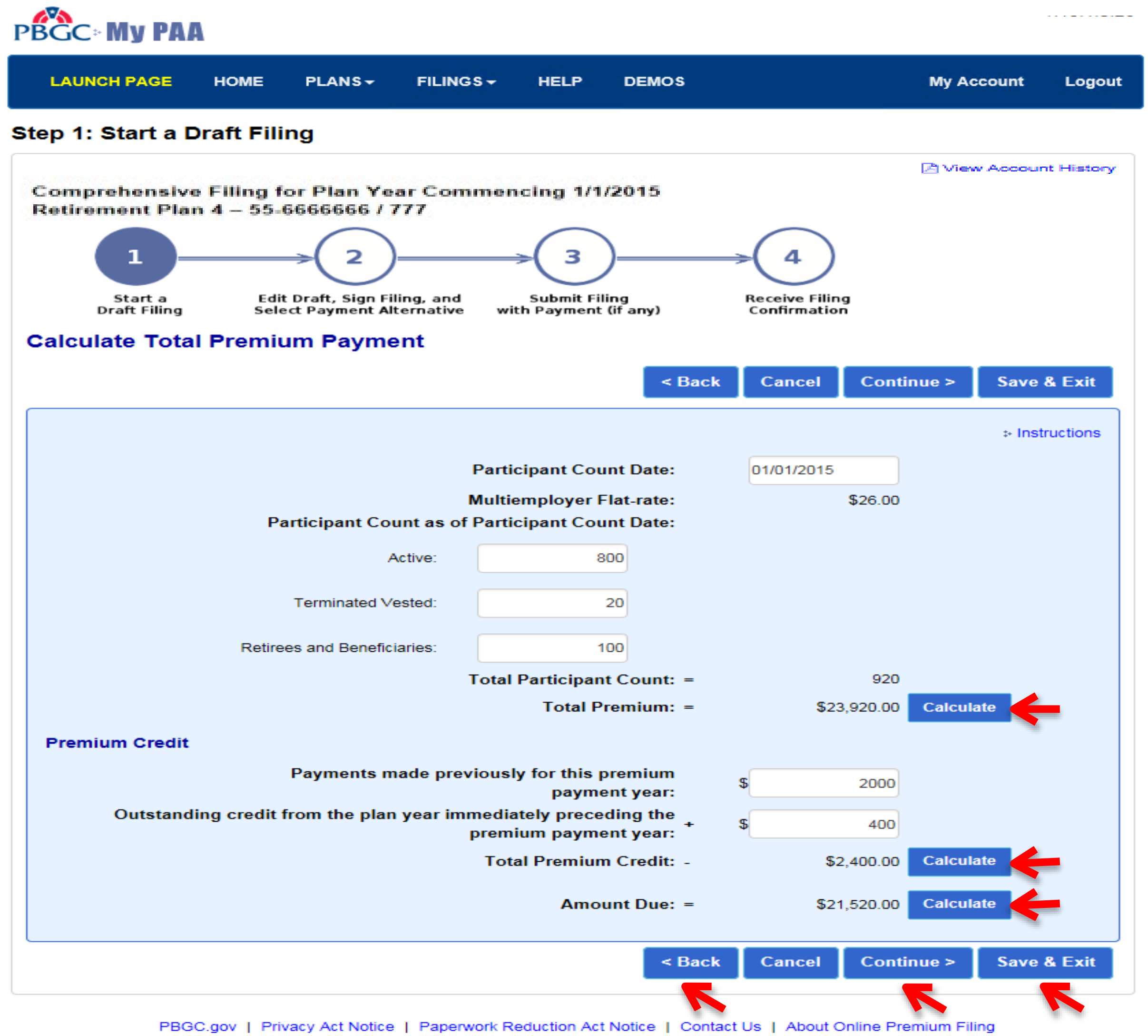


Create a Comprehensive Filing for a Multiemployer Plan

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.



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.

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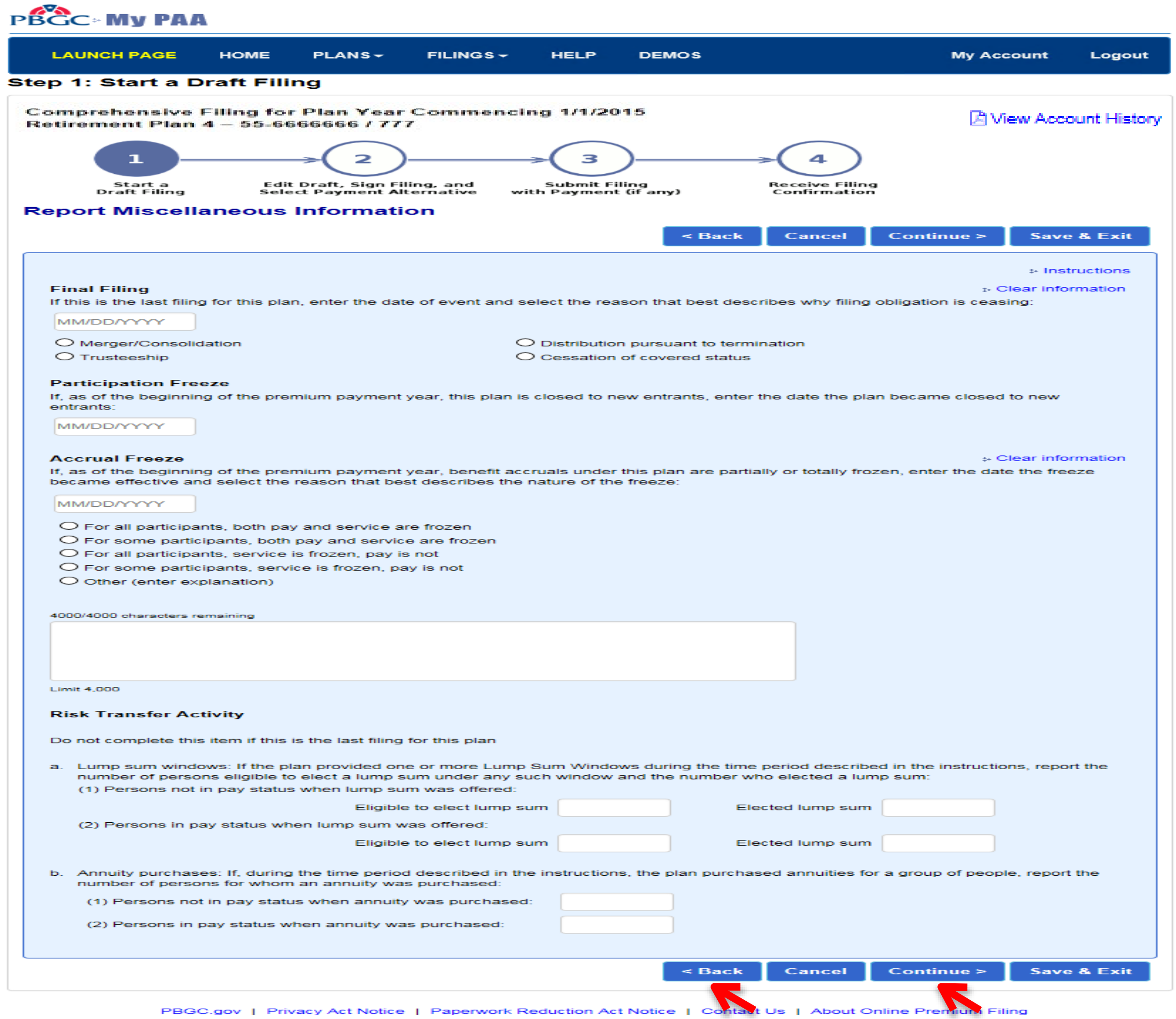

Create a Comprehensive Filing for a Multiemployer Plan

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.

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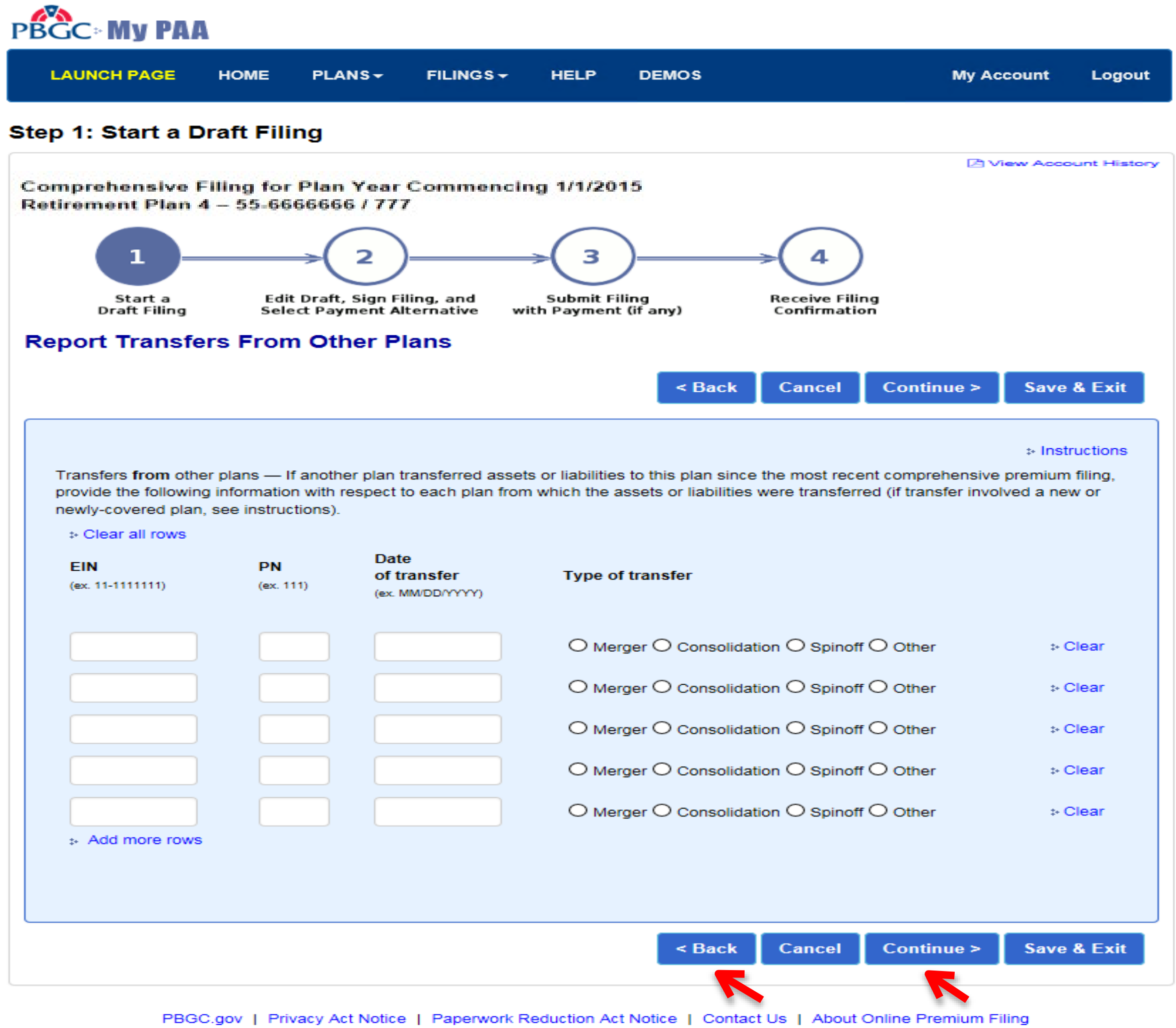
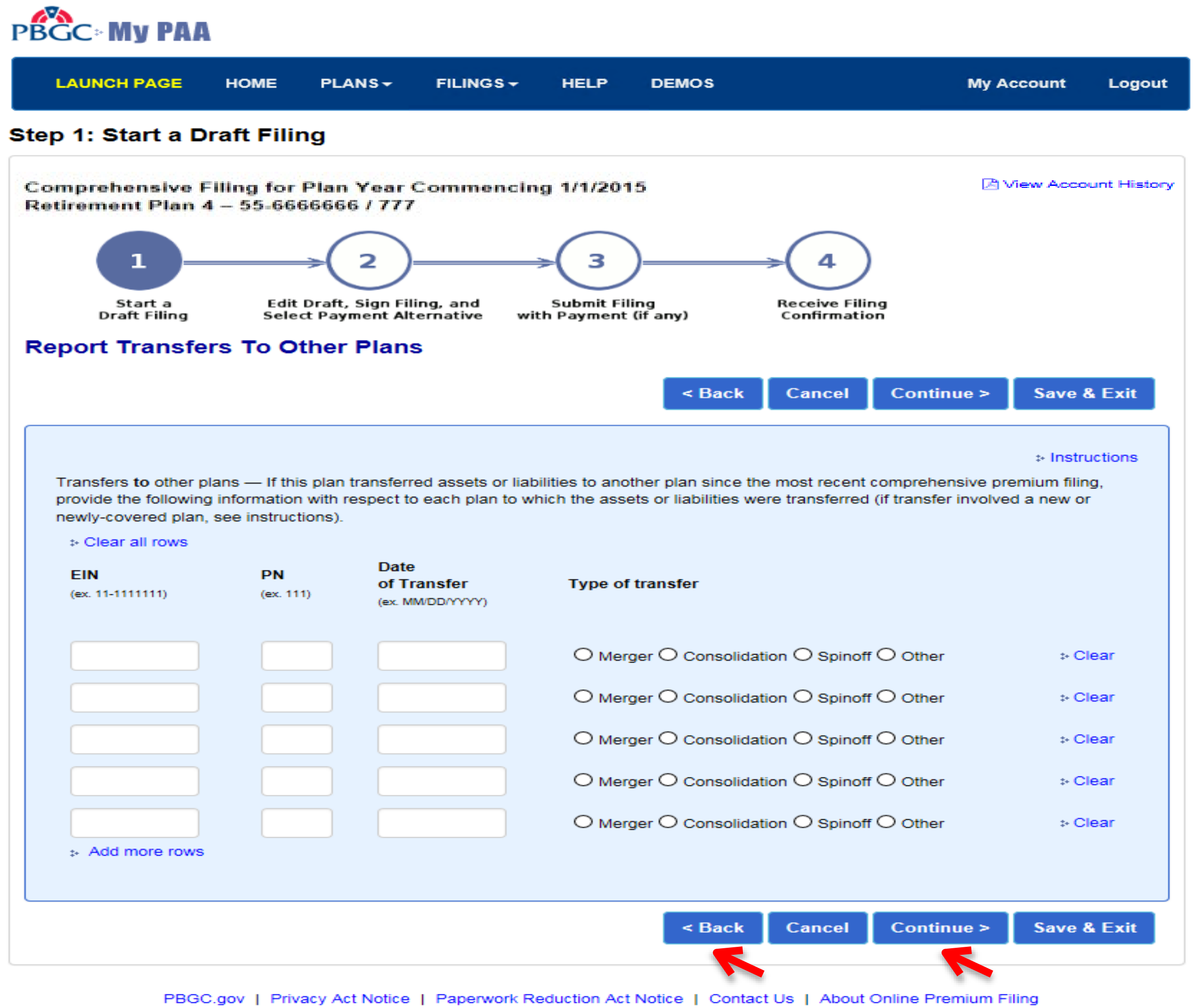


Create a Comprehensive Filing for a Multiemployer Plan

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.



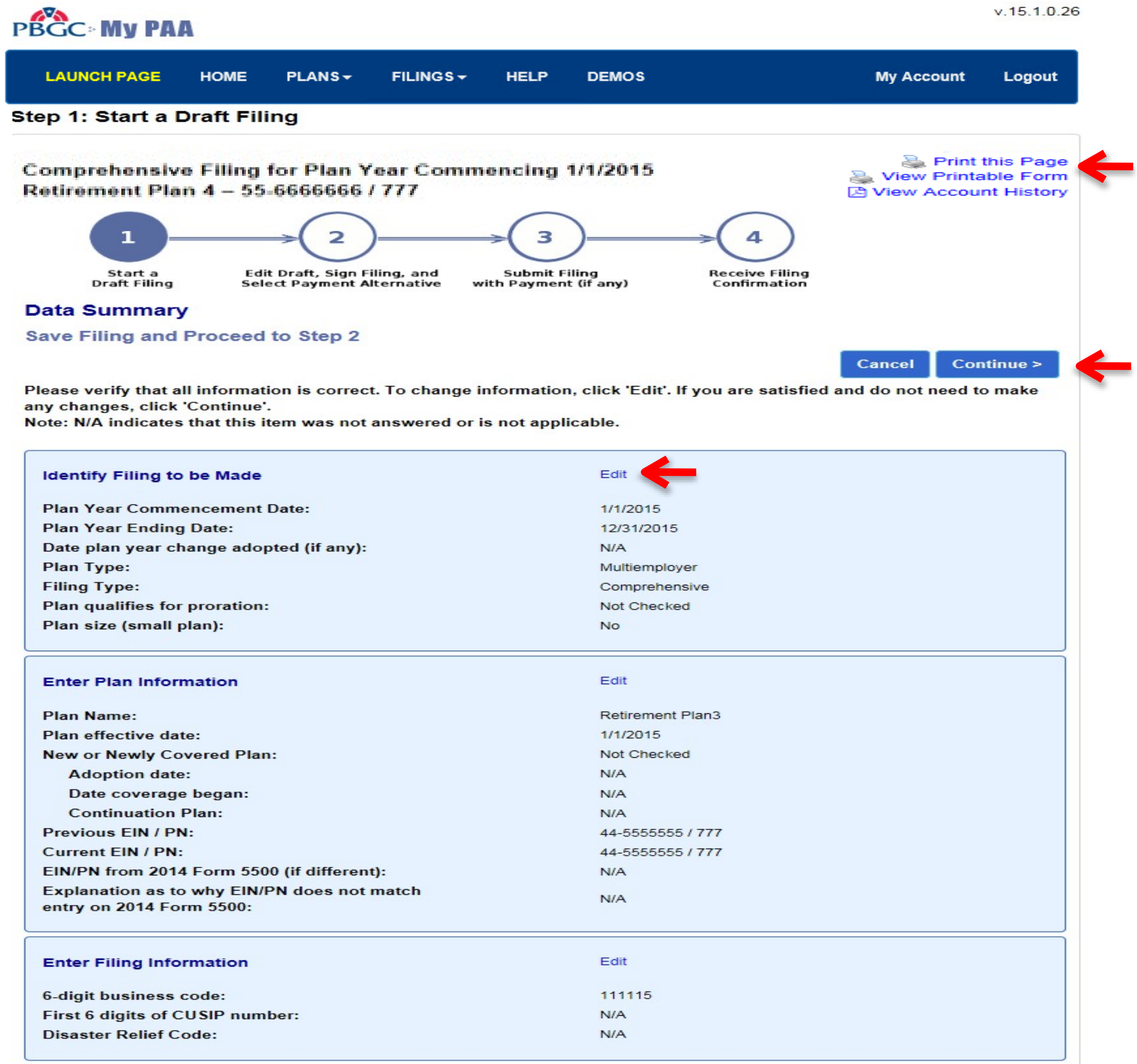
Create a Comprehensive Filing for a Multiemployer Plan

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.

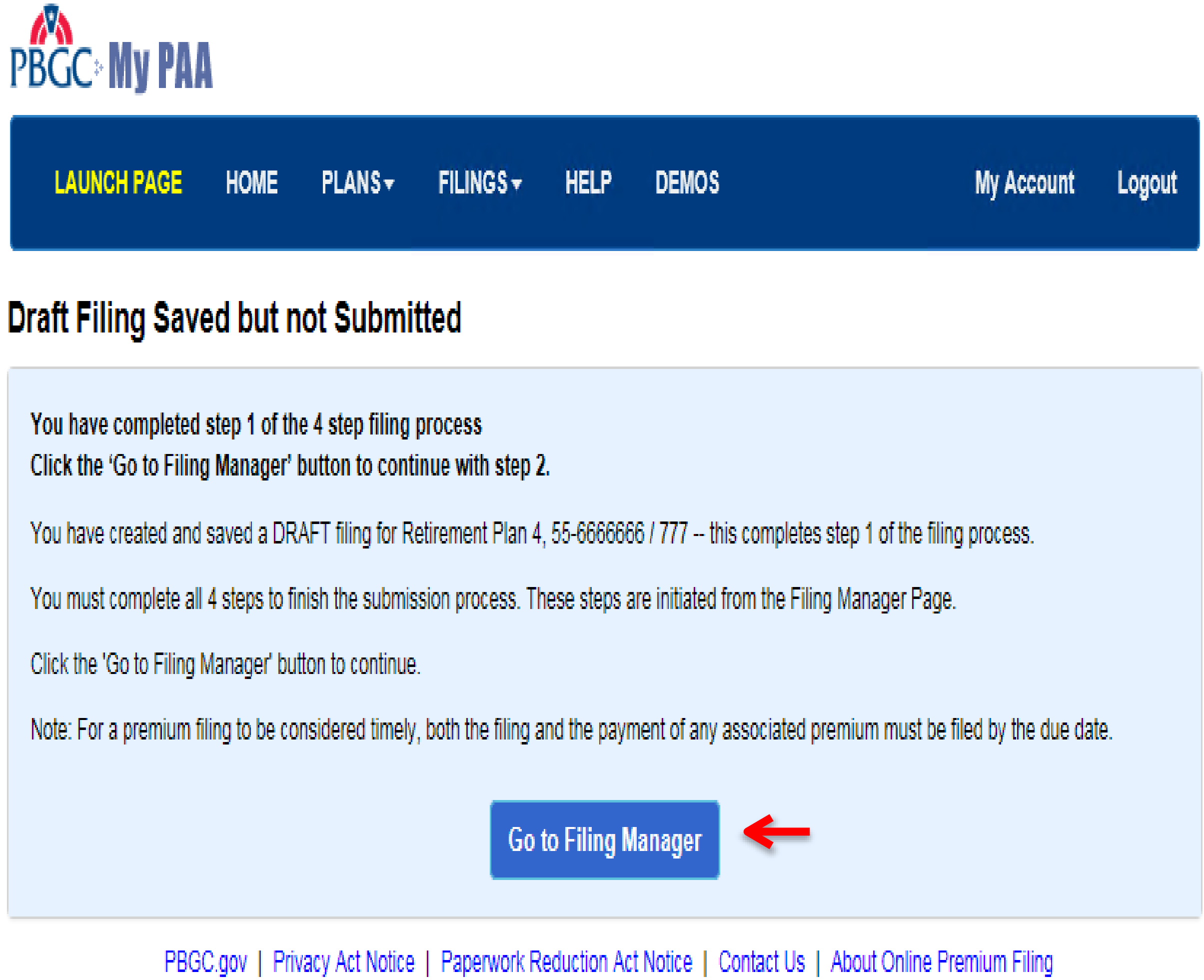
Note: The “NA” next to any Item on this page indicates that the item was not answered or not applicable for the current filing.



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).



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).