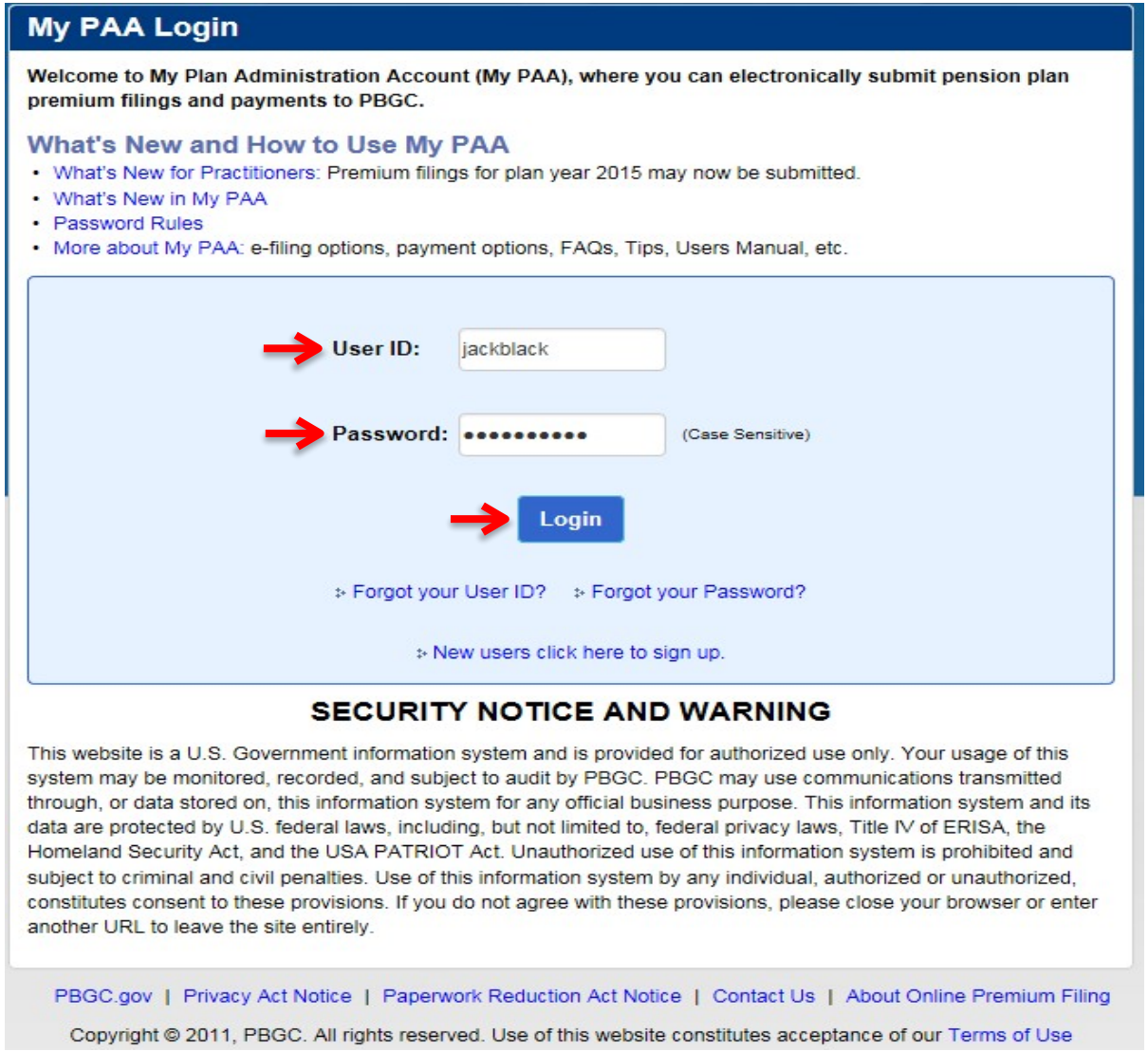
My Plan Administration Account (My PAA) Create a Comprehensive Filing for a Single-Employer Plan

Create a Comprehensive Filing for a Single Employer 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“.

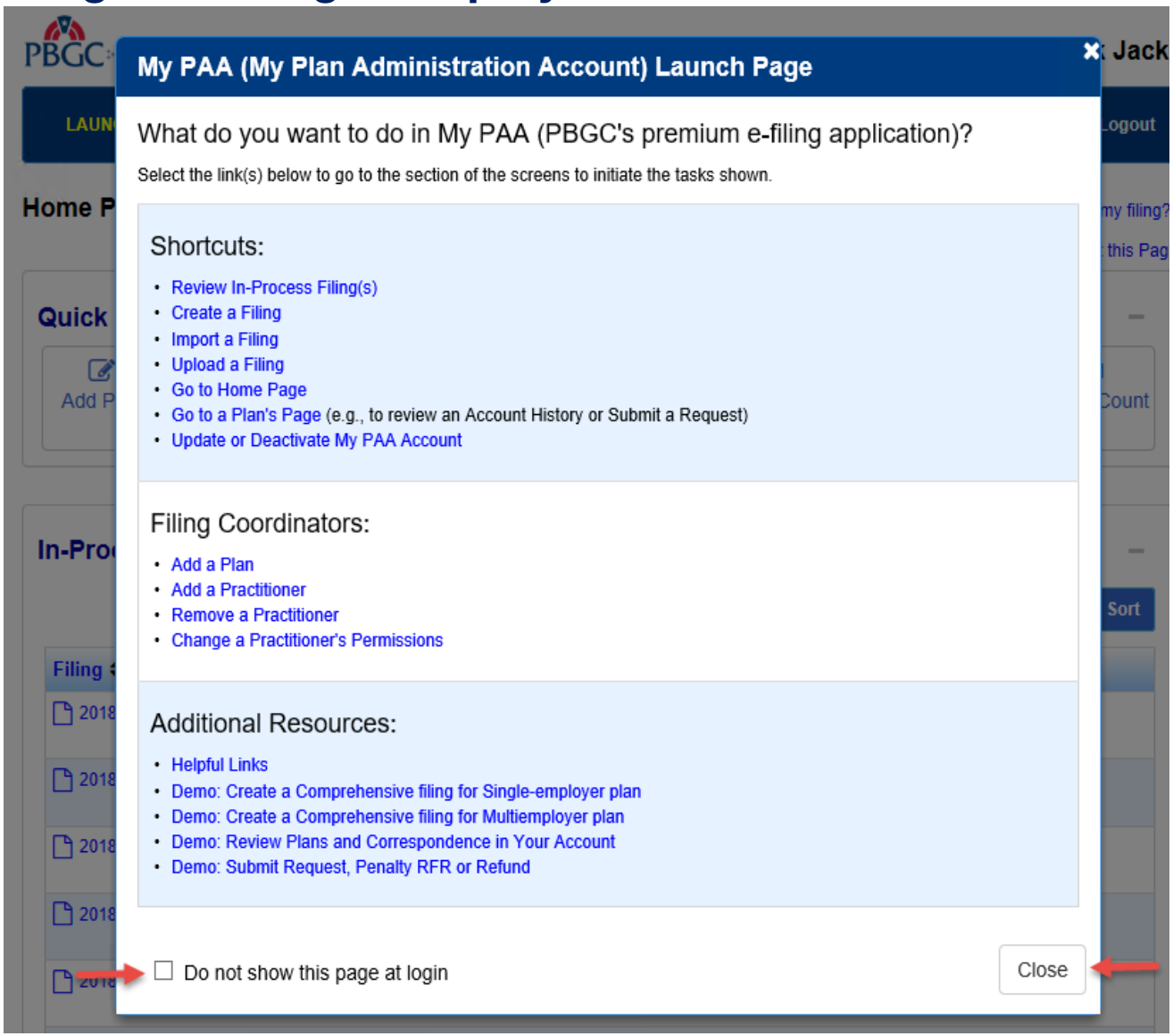


Create a Comprehensive Filing for a Single Employer Plan

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 Single Employer Plan

From the Home Page

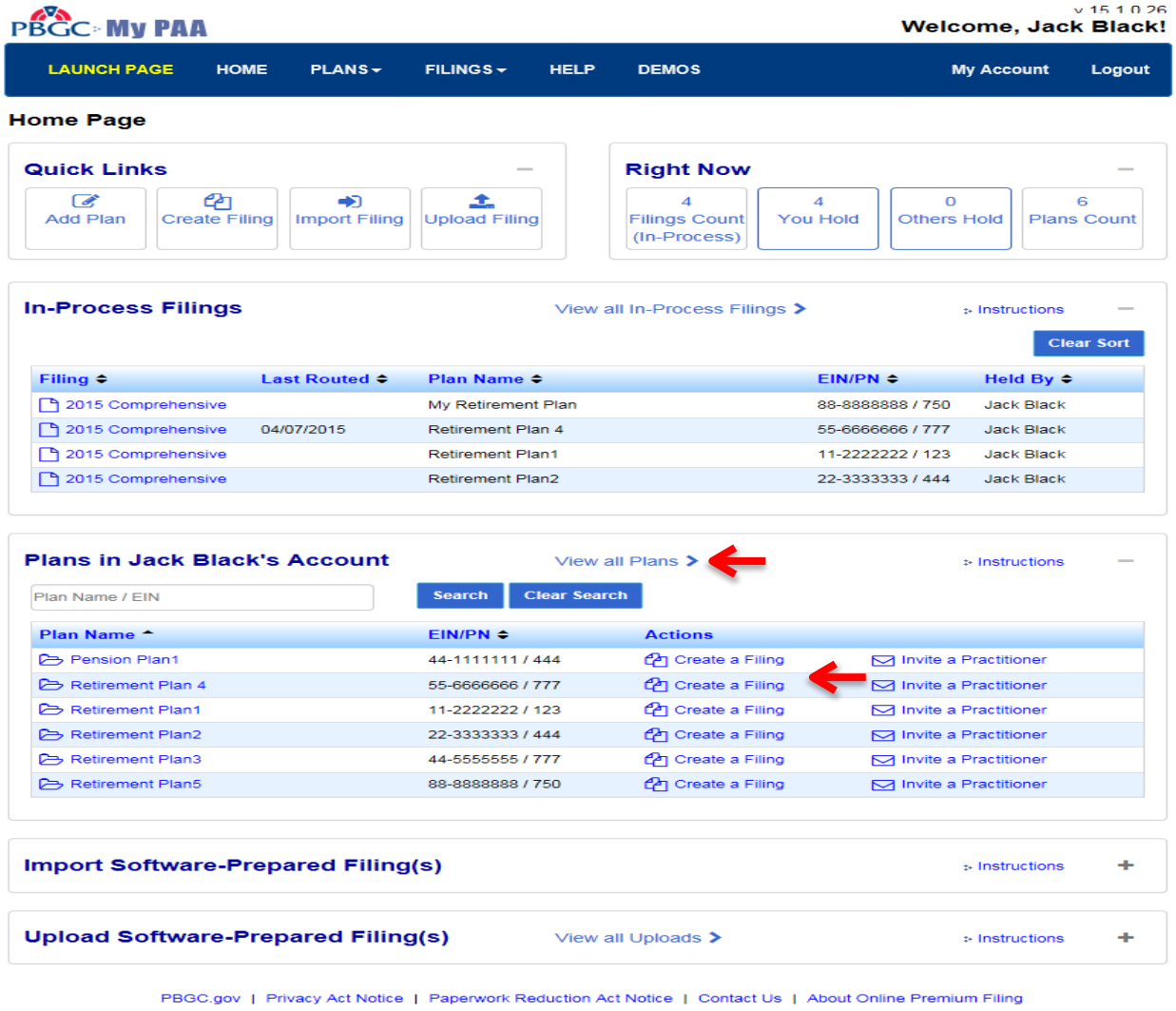
- Select the “Create a Filing” link for the appropriate plan in the Plans in Your Account section.
  - The “How to File” page will be displayed (Slide 6).

- 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.

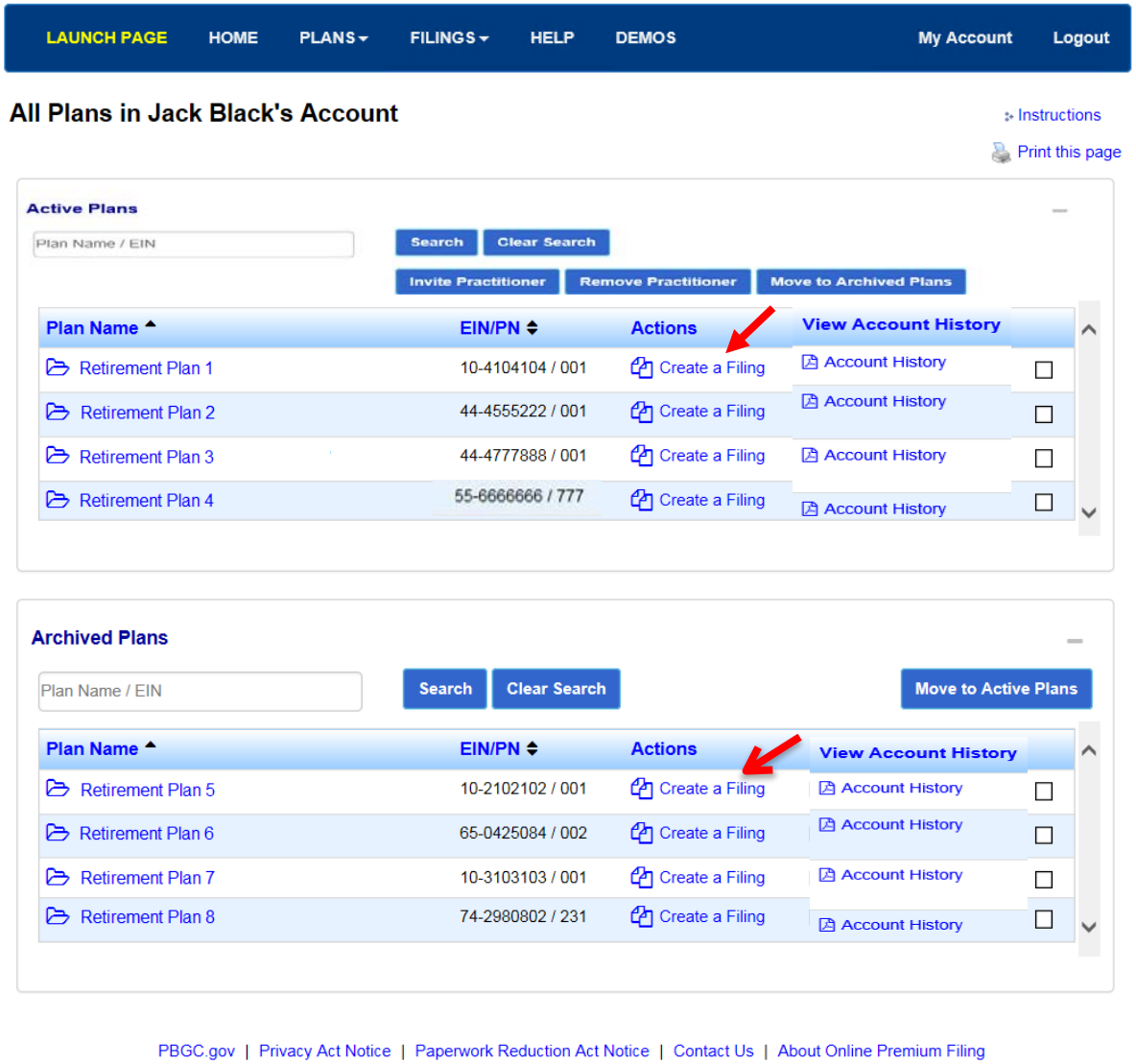


Create a Comprehensive Filing for a Single Employer Plan

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).

PBGC My PAA

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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) 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 Single Employer 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 single-employer plan.
  - Select the "Continue" button to go to the next screen.

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Step 1: Start a Draft Filing

View Account History

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.

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

Identify Filing to be Made

Cancel | Continue >

Instructions

Premium is for plan year commencing: 01/01/2015

Premium is for plan year ending: 12/31/2015

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.

MM/DD/YYYY

☐ 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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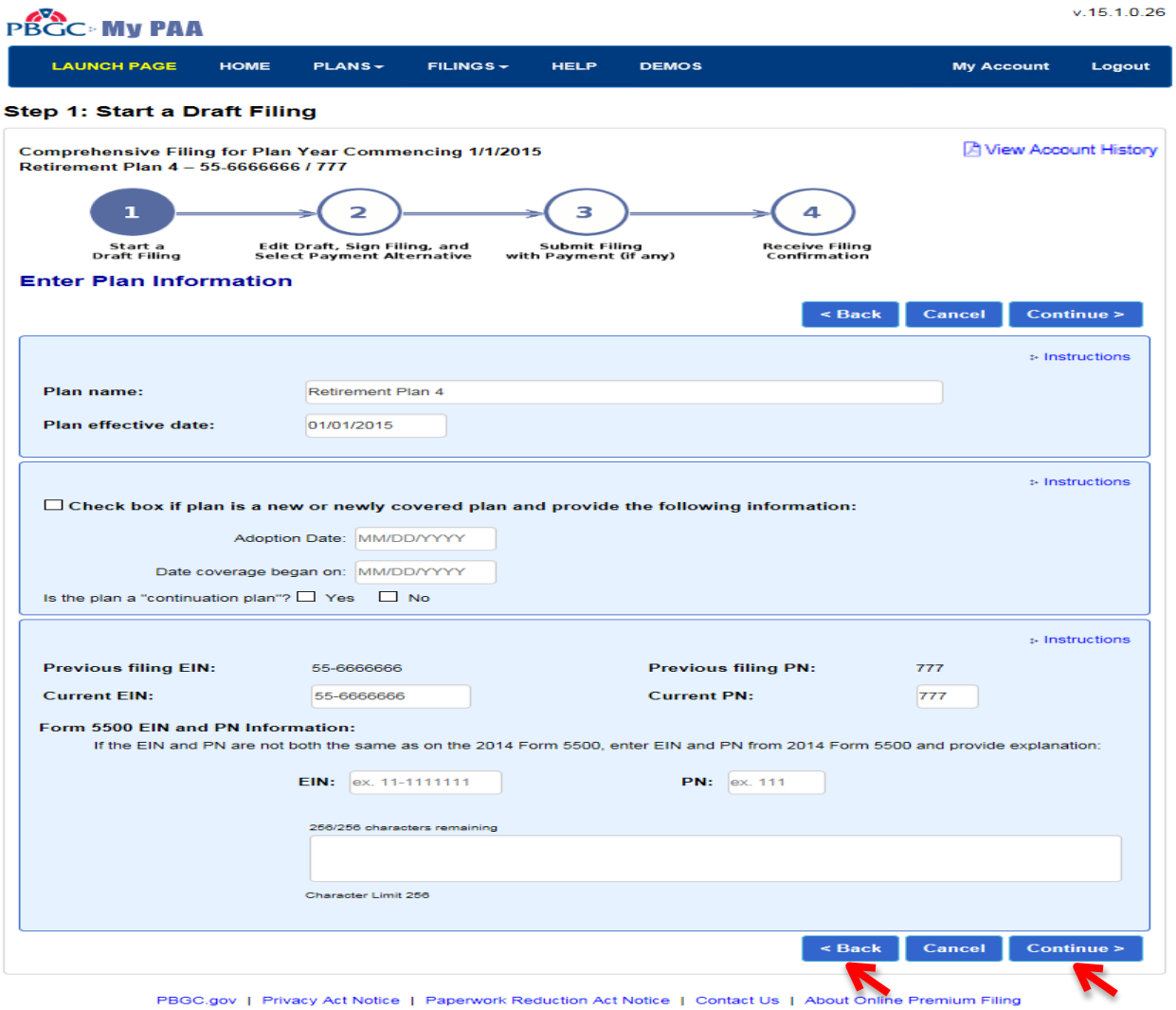
Create a Comprehensive Filing for a Single Employer Plan

Step 1: Start a Draft Filing Page

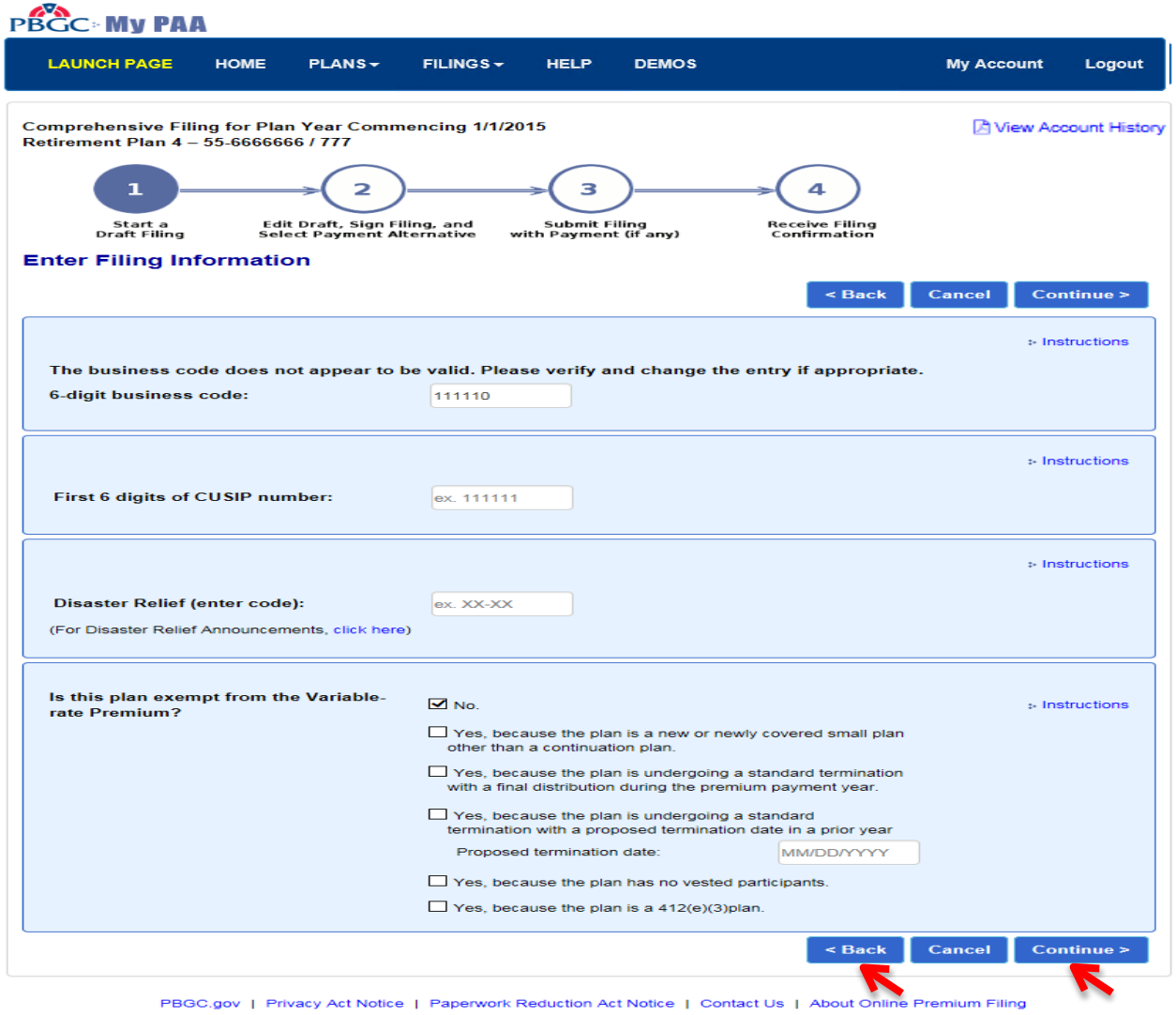
- Enter Plan Information:
  - Enter or select the appropriate information for the filing, e.g., plan name and effective date.
  - Select the “Back” button to review or change your previous entries.
  - Select the “Continue” button to go to the next screen.



Create a Comprehensive Filing for a Single Employer 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 Single Employer Plan

Step 1: Start a Draft Filing Page

- Enter the 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.

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

Enter Plan Sponsor and Administrator Information

< Back | Cancel | Continue >

Plan Sponsor Information Instructions

Name: Jack Black

Plan Administrator Information Instructions

Name: Retirement Plan 4
Country: United States
Address: 123 Test Way
City: Testcity State: VA Zip: 12345

Contact Person

Name (for "attention" line of mailings): Craig Pett
Phone: 1234567910 Ext: ex. 111111
E-mail: Test@testemail.com

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

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

Additional Plan Contact (optional) Instructions

Name:
Phone: ex. 111-111-1111 Ext: ex. 111111
E-mail: ex. aa@a.com

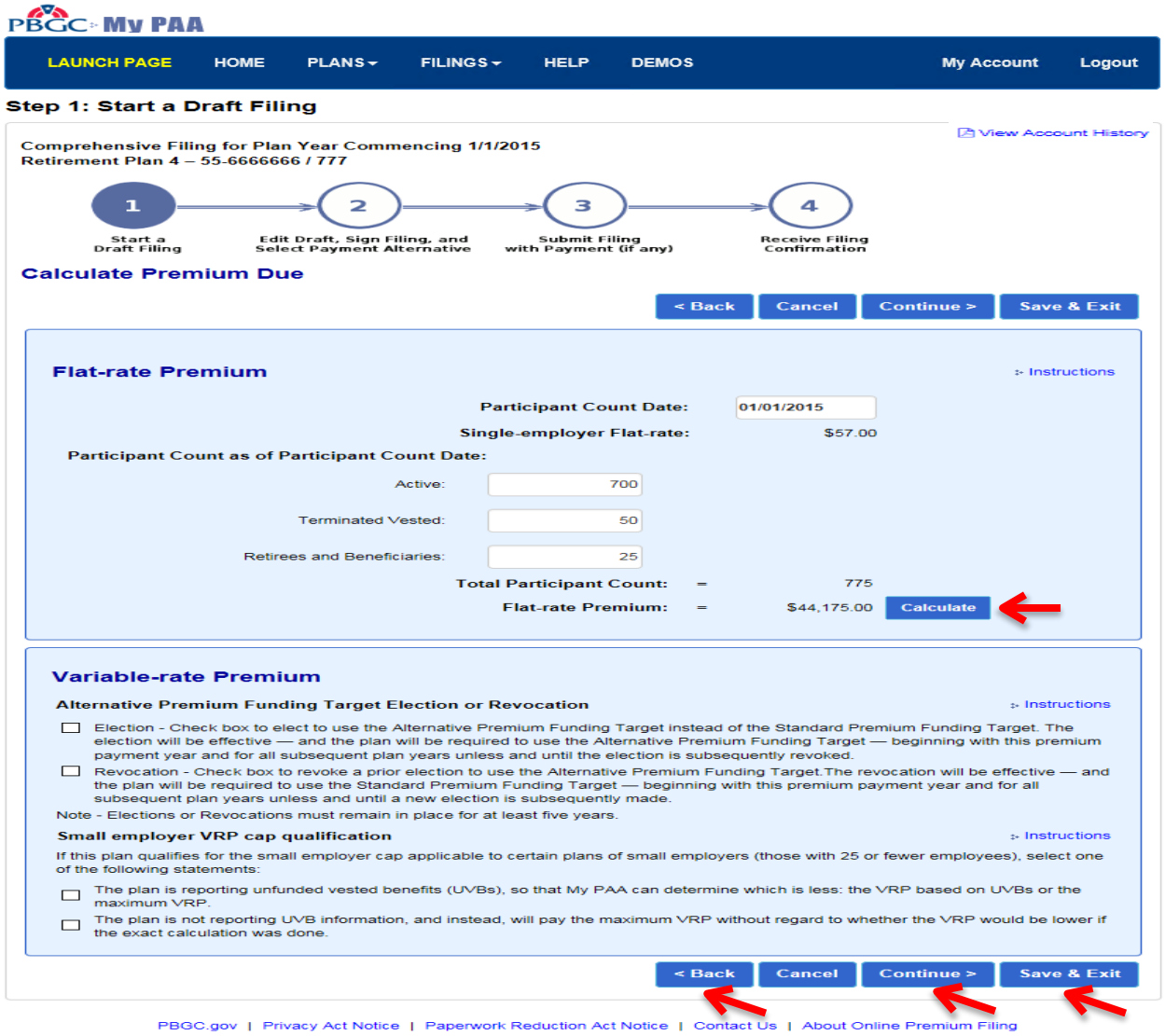
< Back | Cancel | Continue >

Create a Comprehensive Filing for a Single Employer Plan

Step 1: Start a Draft Filing Page

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

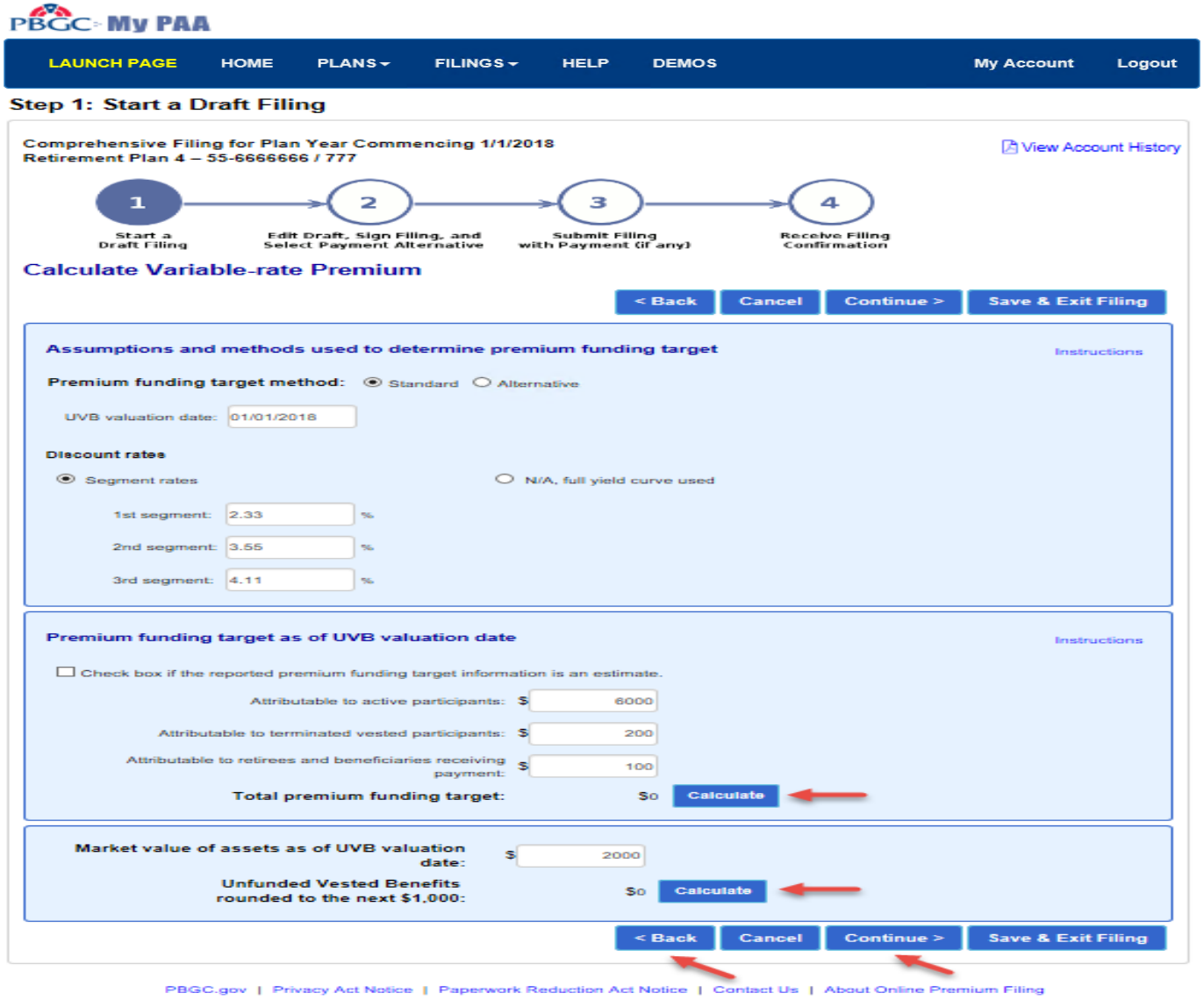
Note: Starting with this page, you can select the "Save & Exit" button to save the filing and logout of My PAA.



Create a Comprehensive Filing for a Single Employer Plan

Step 1: Start a Draft Filing Page

- Calculate Variable-rate Premium:
  - Enter or select the appropriate information for the filing, e.g., premium funding target method.
  - 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.



Create a Comprehensive Filing for a Single Employer Plan

Reminder Message Page

- Review the Reminder Message page based on your previous entry.
- 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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Standard Premium Funding Target Method Used

You reported that the Standard Premium Funding Target (SPFT) is being used to determine the Variable-Rate Premium. Please note these important reminders:

- If an election to use the Alternative Premium Funding Target (APFT) is in effect, this is not a valid option. If an election has been in place for at least five years, you may revoke it and use the SPFT. Otherwise, you must use the APFT.
- To confirm whether an APFT election is in place, select the “Back” button until you reach the screen that reflects the election and revocation information or review the plan’s account history.
- To change the method reported in this filing, select the “Back” button and select the correct method.
- If you need assistance, contact the premium customer service center during normal business hours (premiums@pbgc.gov or 1-800-736-2444 and select the “premium” option).

< Back | Continue >

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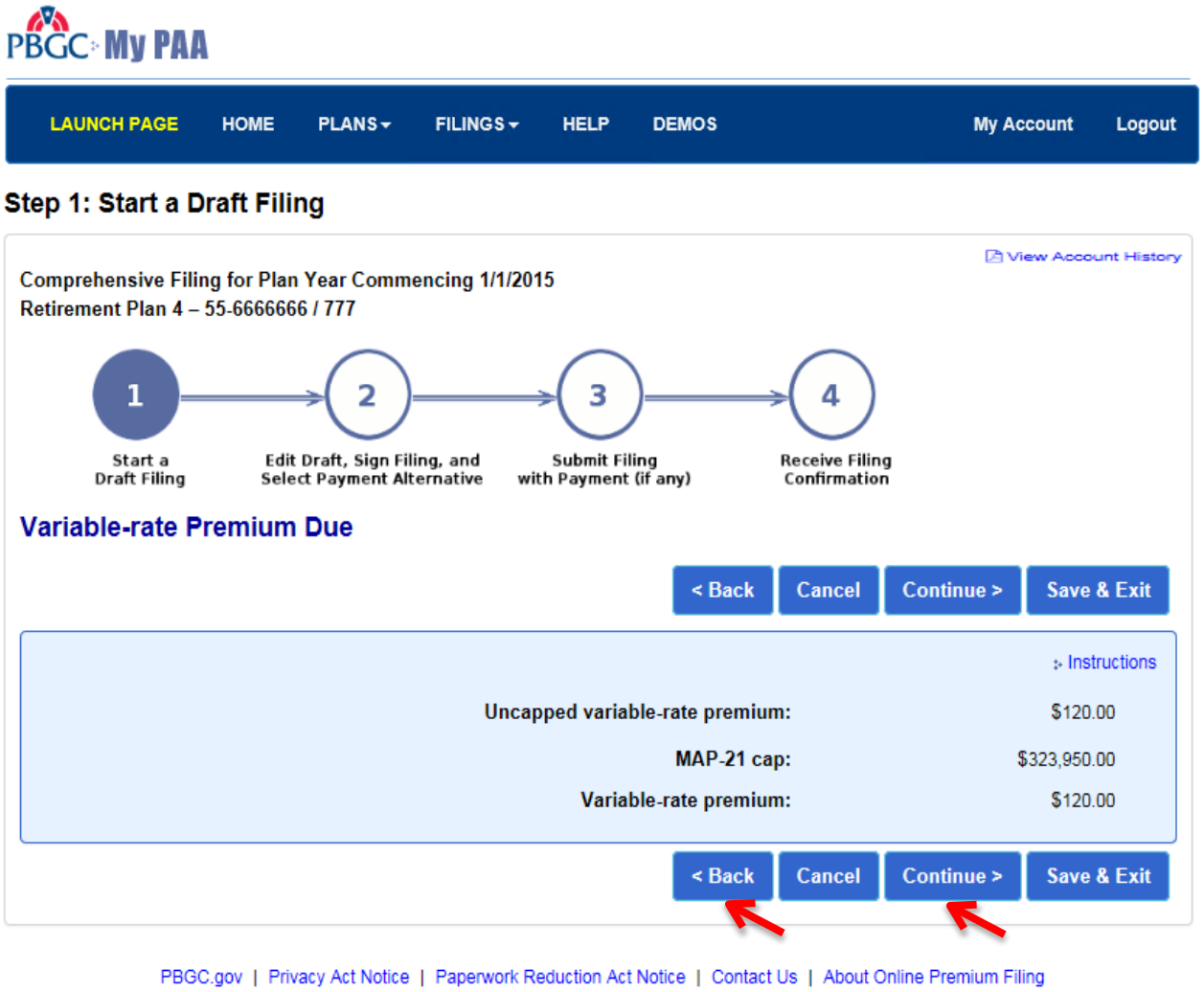
Create a Comprehensive Filing for a Single Employer Plan

Step 1: Start a Draft Filing Page

- Variable-rate Premium Due:
  - Review the calculated values based on your previous entries.
  - 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 Single Employer Plan

Step 1: Start a Draft Filing Page

- Calculate Total Premium Payment:
  - Enter or select the appropriate information for the filing, e.g., payments previously made for the plan year.
  - Select the "Calculate" buttons to display the totals.
  - 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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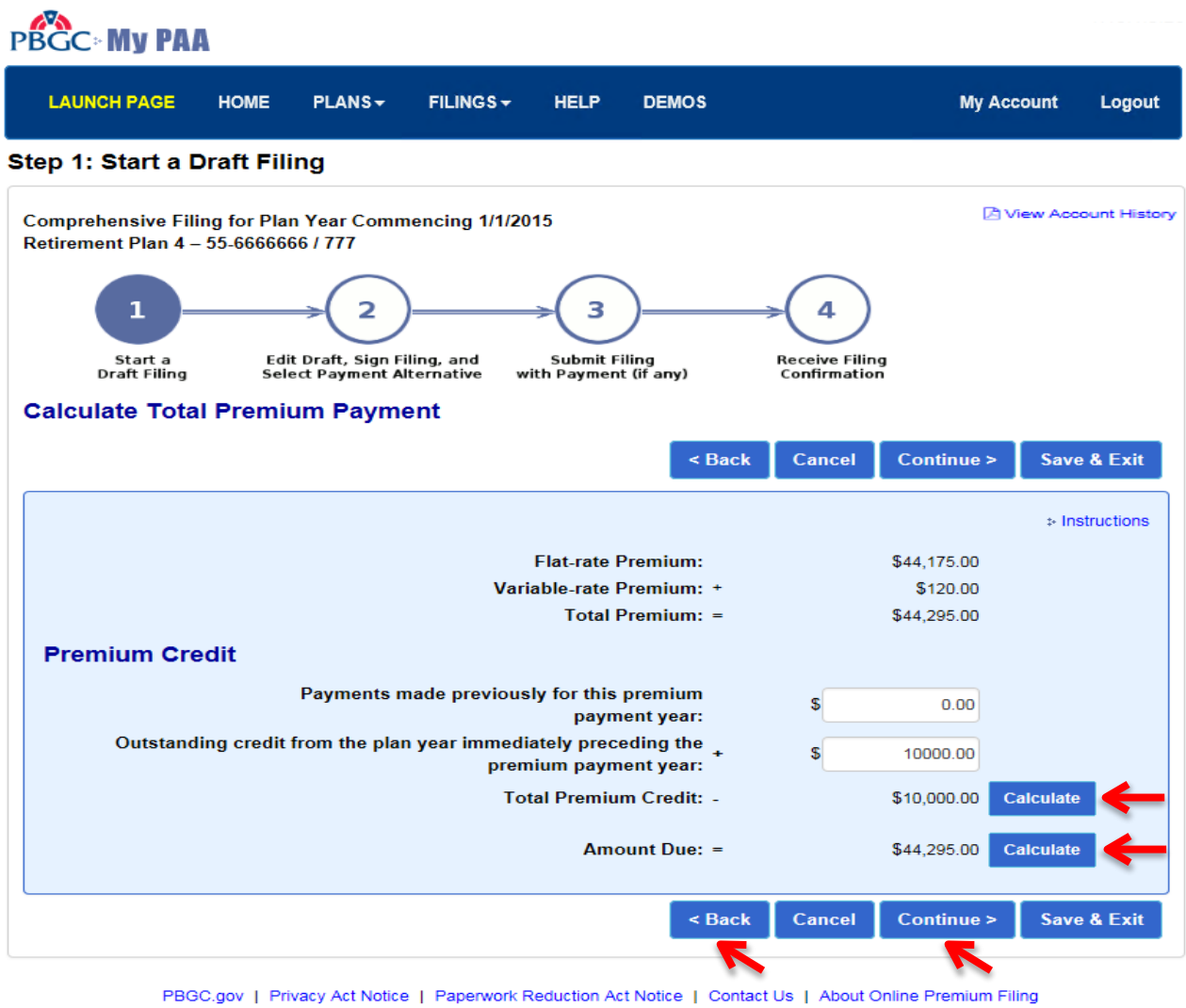
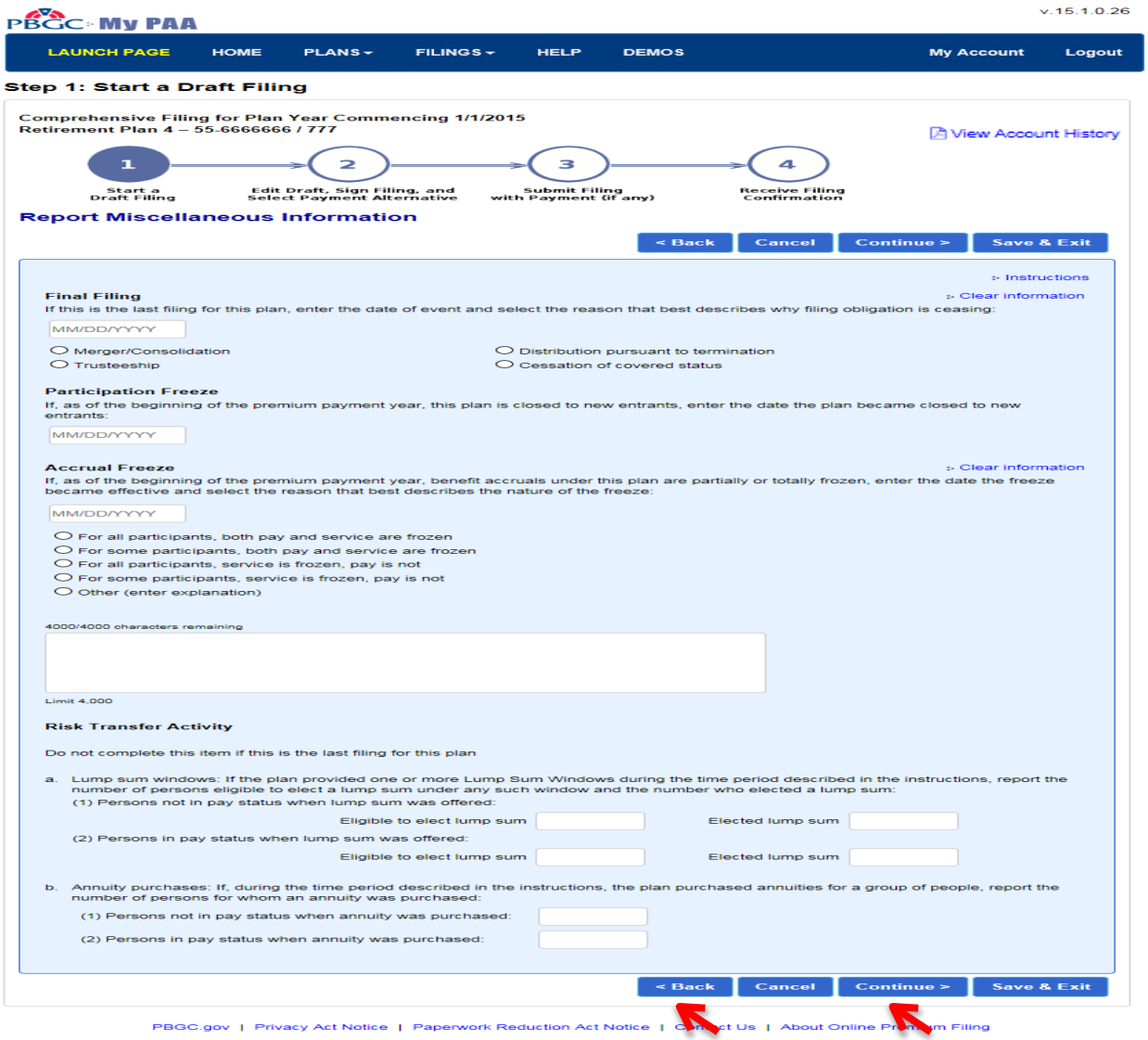


Create a Comprehensive Filing for a Single Employer Plan

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.



Create a Comprehensive Filing for a Single Employer 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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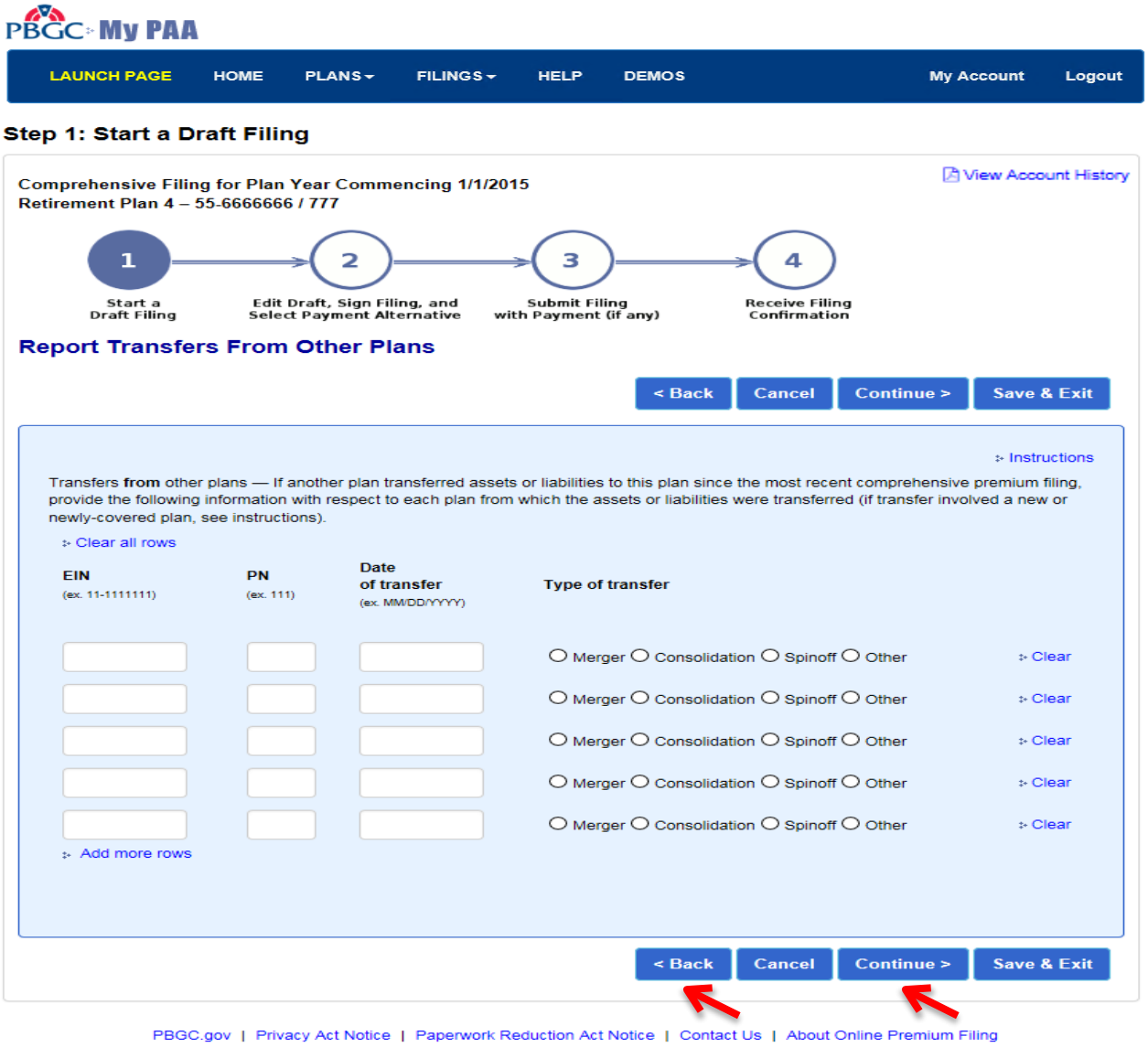

Create a Comprehensive Filing for a Single Employer Plan

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.

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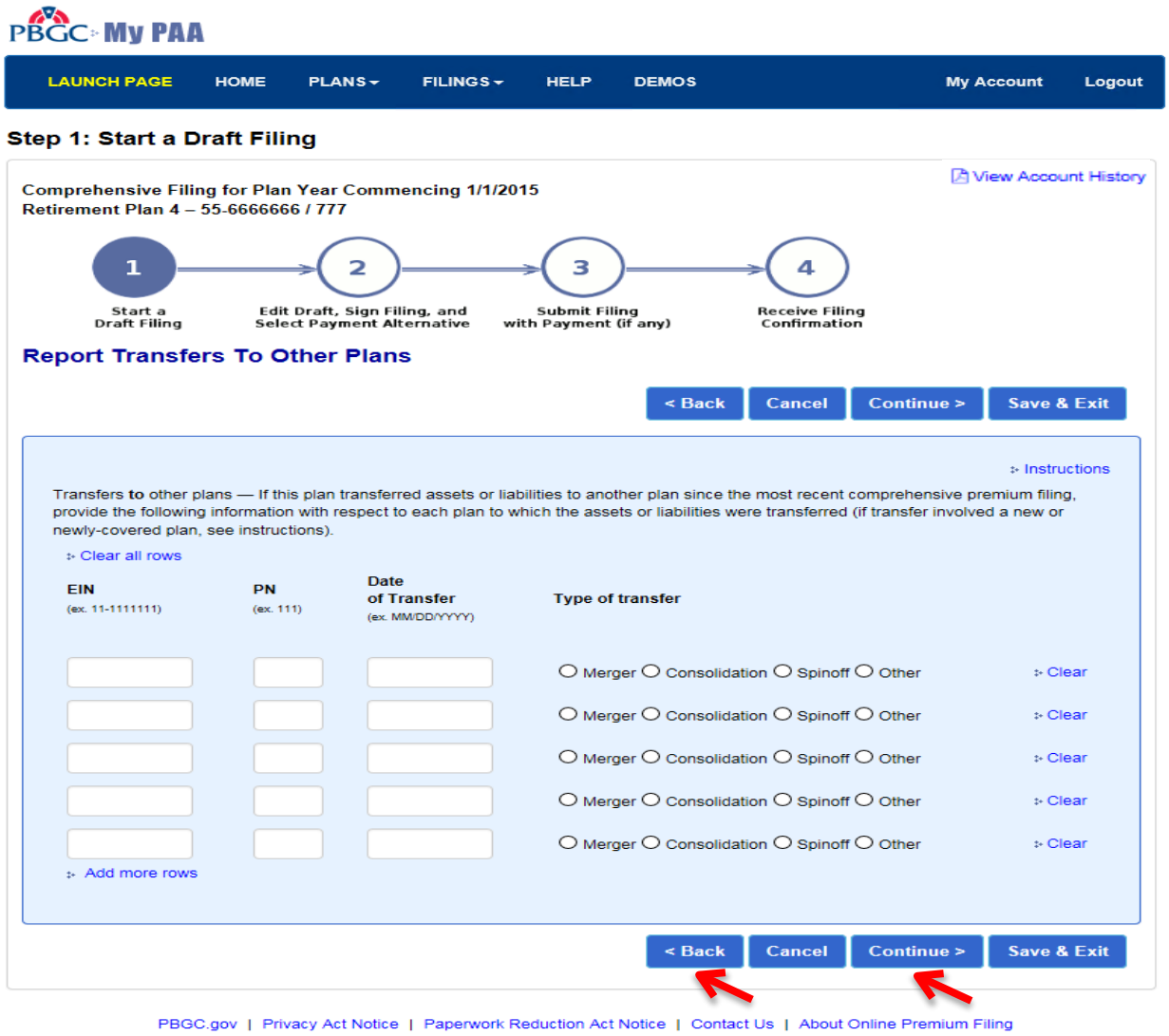


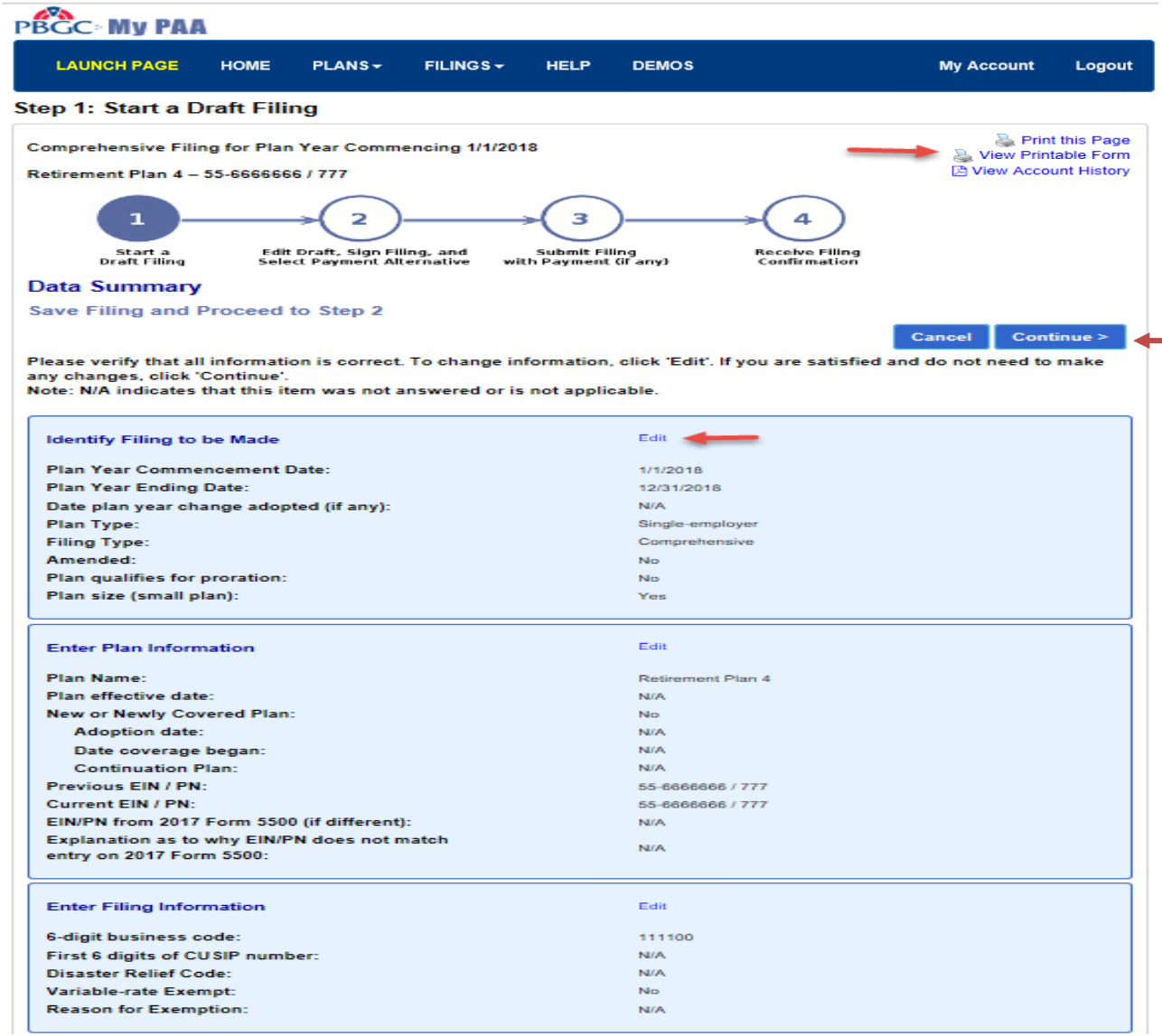
Create a Comprehensive Filing for a Single Employer Plan

Data Summary Page

This page lists all the 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 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 Single Employer 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 21).

Create a Comprehensive Filing for a Single Employer 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).