

# **How to Create or Add Existing Plan to Your Account My Plan Administration Account (My PAA)**

Last Updated:  
September 8<sup>th</sup>, 2021

# How to Create a New/Add Existing Plan to your Account

## Login

- ▶ From the Home Page, click on the "Log in or Sign up" button to log in.
- ▶ Enter your Username into the field labeled username on the My PAA log in pop-up
- ▶ Enter your Password into the field labeled "Password."
- ▶ Click on the "Log in" button.

The screenshot displays the PBGC website's login interface. A blue pop-up window titled "Please log in to continue" is centered on the screen. The window contains the following elements:

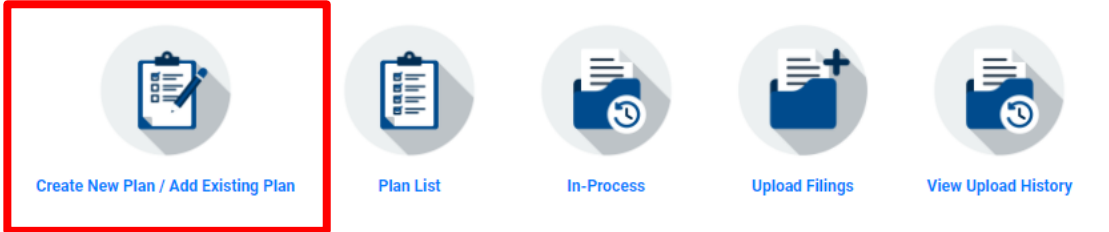
- A link: "Please see [What's New and How To Use MyPAA here](#)"
- A link: "Log In or Create an Account"
- A "Username" input field with a red arrow pointing to it.
- A "Password" input field.
- A link: "Forgot your username or password?"
- A note: "Note: You can only use this self-service find username/ reset password link if your account is not already disabled."
- A warning: "Your account will become disabled upon the 5th unsuccessful login attempt."
- A warning banner: "WARNING!!! WARNING!!! WARNING!!!"
- A "Log in" button (blue) and a "Cancel" button (yellow).

The background of the website is dimmed, showing a navigation menu with "Home Page" and "Ask a Question", and a sidebar with links like "Create New Plan / Add Existing Plan", "Training Materials", "How to file for a claim", "Who is the Plan Administrator?", and "Filing Status".

# How to Create a New/Add Existing Plan to your Account

## Home Page

- ▶ Once you have logged in, click on the “Create New Plan/Add Existing Plan” icon or link from the Home Page.



**WARNING!!! WARNING!!! WARNING!!!**

You are accessing a computer system operated by the Pension Benefit Guaranty Corporation, a wholly owned corporation of the United States Government. It is for authorized use only, in compliance with the PBGC Policy on the Use of Information Technology Resources and federal statutes, and when use is authorized, such use may not exceed the scope of authorization.

Use of this system is subject to audit, and all files and transmissions on this system may be intercepted, monitored, recorded, copied, or inspected to ensure that use is authorized, for management of the system, to facilitate protection against unauthorized access, to verify security procedures, and for such other purposes as may be deemed necessary, consistent with federal law. Unauthorized or improper use of this system may result in administrative action, civil, and/or criminal penalties. Any information collected during an audit or monitoring may be used in administrative, civil, or criminal actions and may be disclosed to authorized officials of other agencies, both domestic and foreign. Examples of unauthorized or improper use include, but are not limited to: uploading or changing the information presented on this system with intent to damage this system; attempting to gain unauthorized access to data; attempting to redirect authorized users away from this system; or attempting to deny service to authorized users.

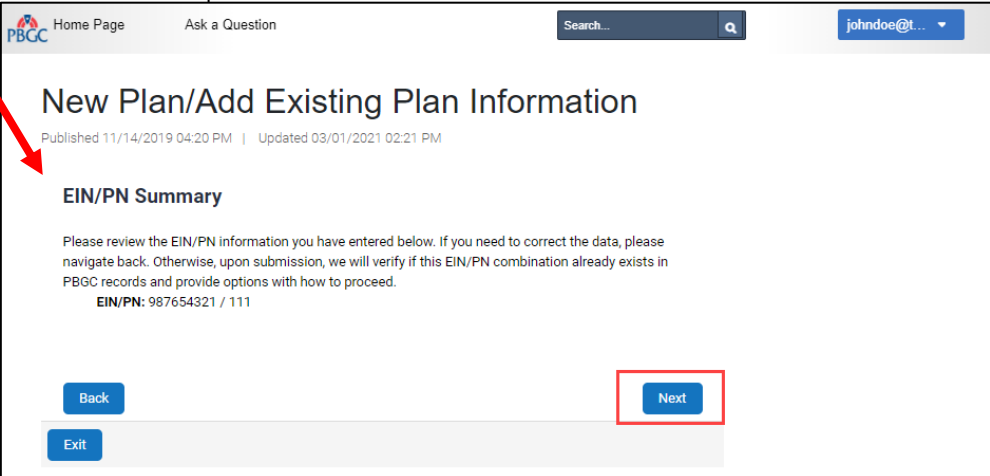
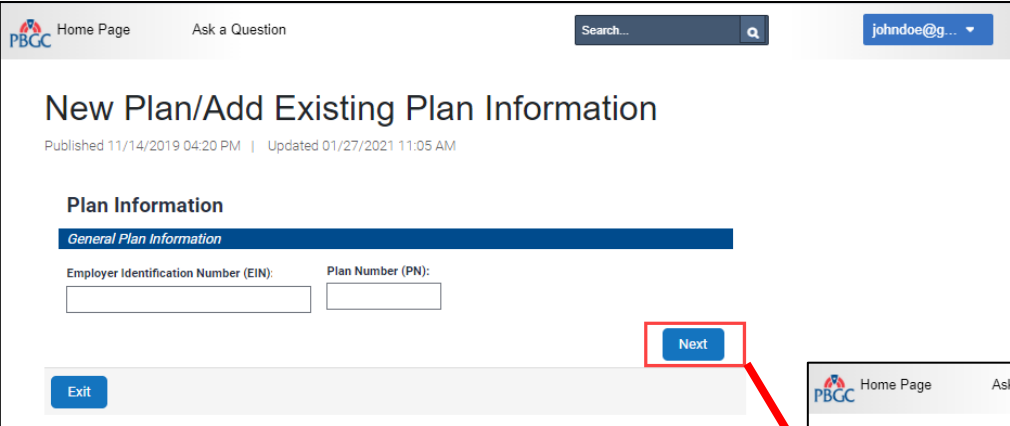
By using this system, the user consents to the auditing, interception, monitoring, recording, copying, inspection, and disclosure as described above. Clicking below or otherwise continuing to use this system indicates your awareness of and consent to these terms and conditions of use. Leave this site, cease use or log off immediately if you do not agree to the conditions stated in this warning.

# How to Create a New Plan and Add it to your Account

## New Plan/Add Existing Plan Information Page

### Add a New Plan

- ▶ Enter the 9-digit Employer Identification Number (EIN), and the 3-digit Plan Number (PN) for the new plan. Then click “Next.”
- ▶ You will be directed to a Summary Page to confirm the EIN/PN you entered on the previous screen. Click “Next” to continue adding the plan, if the EIN/PN is correct. If the EIN/PN combination is incorrect, then click “Back” to return to the previous screen and update.



# How to Create a New Plan and Add it to your Account

## New Plan/Add Existing Plan Information Page

### Add a New Plan

- ▶ My PAA will confirm that the plan does not already exist in PBGC's records. Once that information is confirmed, please provide the General Plan Information and Plan Admin Information
- ▶ Required fields
  - Plan Name
  - Effective Date
  - Plan Admin Name, Email Address, Phone Number and Mailing Address
- ▶ Once the information has been provided and validated, click the "Next" button.



Home Page    Ask a Question    Search...    johndoe@t...

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 03/01/2021 02:21 PM

#### EIN/PN Lookup Results

The EIN/PN combination you entered does not currently exist in PBGC records. If you believe that the EIN/PN combination you entered does exist in PBGC records, please click the "Exit" button and attempt this process again ensuring you are using the correct EIN/PN. If you still arrive at this message and believe it is an error, please click [here](#), for further assistance. Otherwise, you can proceed with creating a new Defined Benefit Pension Plan for the purposes of submitting annual Comprehensive Premium Filings with the PBGC.

#### General Plan Information

Plan Name:

Effective Date:

#### Plan Admin Information

Admin's Name:

's Email Address:

's Phone Number:

Address 1:

Address 2:

Country:     City:     State:     Zip Code:

# How to Create a New Plan and Add it to your Account

## New Plan/Add Existing Plan Information Page

### Add a New Plan

- ▶ Once the plan has been created you will be redirected to the completion page, and My PAA will also send a confirmation email to the email address associated with your My PAA Account. The email will contain the plan's Plan ID number.
- ▶ You will now be able to continue with any premium related action for the plan by clicking on the "Back to Plan List" button.

Home Page Ask a Question Search... johndoe@t...

## New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 03/01/2021 02:21 PM

### Plan Creation Request Complete

You have successfully created a new Plan in My PAA with the details below. Since you are the first filing team member for this Plan, you are automatically assigned as the Plan's Filing Coordinator. This role allows you to add new members to the filing team and [manage their associated roles](#). This Plan should now be available in your "Plan List" from the Home Page, or by clicking the button below.

If you do not receive a confirmation email stating the Plan ID for this newly created Plan, please update the associated incident from the [Account Activity History](#).

**Plan Details:**  
**Plan Name:** Testing 123 ABC  
**EIN/PN:** 987654321/111  
**Effective Date:** 01/01/2019

Exit Back to Plans List

# How to Create a New Plan and Add it to your Account

## New Plan/Add Existing Plan Information Page

### Add a New Plan

- ▶ The new plan has been added to your My PAA account's Plan List.
  - The "Create Filing" button is grayed out because you are added to the Plan only as a Filing Coordinator. You will need to go to the Manage Roles Page to assign yourself the appropriate roles.

JOHN SMITH	Filing Coordinator	<input type="checkbox"/>	pbgc_58479@invalid.com	(222) 222-2222	09/08/2021	<input type="checkbox"/>
------------	--------------------	--------------------------	------------------------	----------------	------------	--------------------------

JOHN SMITH	Filing Coordinator   Filing Preparer	<input type="checkbox"/>	pbgc_58479@invalid.com	(222) 222-2222	09/08/2021	<input type="checkbox"/>
------------	--------------------------------------	--------------------------	------------------------	----------------	------------	--------------------------

### Plans in your My PAA Account

Show 10 entries Search:

ID	Plan ID	EIN	PN	Name	Last Filing Update		
248118	729175	953174837	002	TEST AND SERVICES PENSION PLAN	09/08/2021	CREATE FILING	PLAN DETAILS
248487	2429567	333666999	369	Test Test Test	07/01/2021	CREATE FILING	PLAN DETAILS
248456	2377551	452615050	002	Testing EIN PN blank issue	06/29/2021	CREATE FILING	PLAN DETAILS
248416	86264	123456789	001	SPECIAL NON-PREMIUM TRANSACTIONS	06/11/2021	CREATE FILING	PLAN DETAILS

Showing 1 to 4 of 4 entries First 1 Last

### Plans in your My PAA Account

Show 10 entries Search:

ID	Plan ID	EIN	PN	Name	Last Filing Update		
248118	729175	953174837	002	TEST AND SERVICES PENSION PLAN	09/08/2021	CREATE FILING	PLAN DETAILS
248487	2429567	333666999	369	Test Test Test	07/01/2021	CREATE FILING	PLAN DETAILS
248456	2377551	452615050	002	Testing EIN PN blank issue	06/29/2021	CREATE FILING	PLAN DETAILS
248416	86264	123456789	001	SPECIAL NON-PREMIUM TRANSACTIONS	06/11/2021	CREATE FILING	PLAN DETAILS

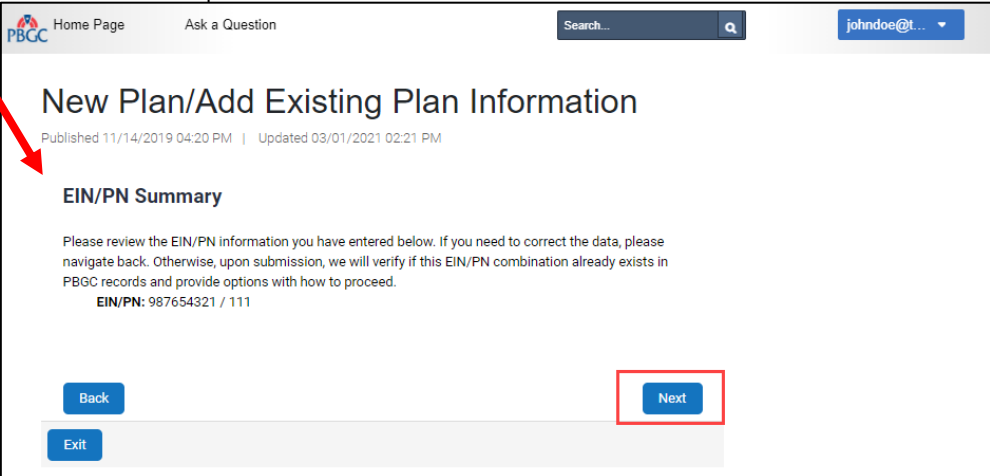
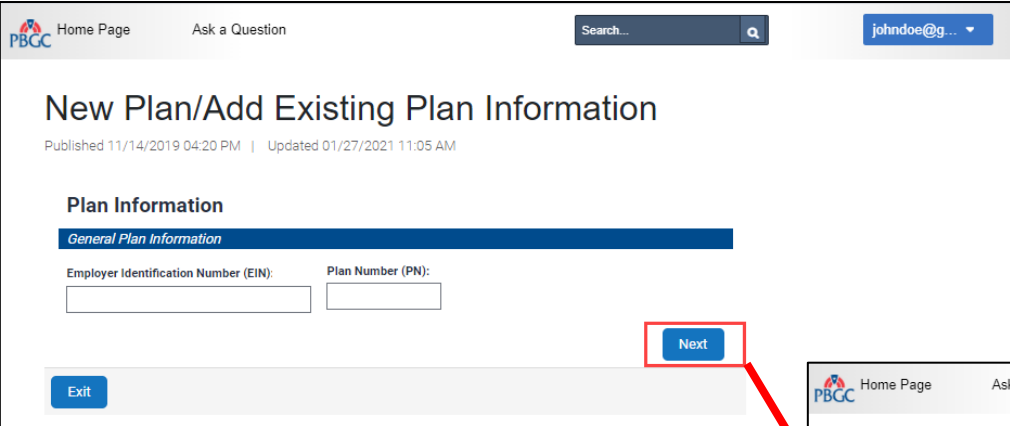
Showing 1 to 4 of 4 entries First 1 Last

# How to Add an Existing Plan to your Account

## New Plan/Add Existing Plan Information Page

### Add a New Plan

- ▶ Enter the 9-digit Employer Identification Number (EIN), and the 3-digit Plan Number (PN) for the new plan. Then click “Next.”
- ▶ You will be directed to a Summary Page to confirm the EIN/PN you entered on the previous screen. Click “Next” to continue adding the plan, if the EIN/PN is correct. If the EIN/PN combination is incorrect, then click “Back” to return to the previous screen and update.





# How to Add an Existing Plan to your Account

## New Plan/Add Existing Plan Information Page

### Add an Existing Plan

- ▶ Once you have confirmed the EIN/PN combination, you will be able to choose one of three different ways to add the plan to your My PAA account.
  - Contact the existing Filing Coordinator (listed in the Plan Details section) if you know them (slide 11)
  - Have My PAA send an automated email message to the existing Filing Coordinator (slide 12)
  - Request help from a PBGC Customer Service Agent (slide 13)

Home Page Ask a Question Search... johndoe@t...

## New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 03/01/2021 02:21 PM

### EIN/PN Lookup Results

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details, including the current Filing Coordinator are listed below.

**Plan Details:**  
**Plan Name:** Testing 123 ABC  
**EIN/PN:** 987654321/111  
**Filing Coordinator Name:** Logan Smith

Please select one of the following options:

- If you know the existing Filing Coordinator, contact them directly to add you to the filing team (no automated action will occur).
- Send the existing Filing Coordinator an email request to add you to the filing team.
- Request assistance from a PBGC Customer Service Agent.

Next

Exit

# How to Create a New/Add Existing Plan to your Account

## New Plan/Add Existing Plan Information Page

### Add an Existing Plan

- ▶ If you choose to contact the existing Filing Coordinator, no action will be taken by PBGC.
- ▶ It is your responsibility to use any means of communication to have the Filing Coordinator of the plan log into their My PAA account and add you to the plan.
- ▶ If the Filing Coordinator needs further assistance adding you to the plan, please view our How to Manage Roles demo for step-by-step instructions.
- ▶ You will be able to continue with any premium related action for the plan once the plan has been added to your Plan List.



Home Page Ask a Question Search... johndoe@t...

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 03/01/2021 02:21 PM

#### EIN/PN Lookup Results

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details, including the current Filing Coordinator are listed below.

**Plan Details:**  
**Plan Name:** Testing 123 ABC  
**EIN/PN:** 987654321/111  
**Filing Coordinator Name:** Logan Smith

Please select one of the following options:

- If you know the existing Filing Coordinator, contact them directly to add you to the filing team (no automated action will occur).
- Send the existing Filing Coordinator an email request to add you to the filing team.
- Request assistance from a PBGC Customer Service Agent.

Exit Next

---

Home Page Ask a Question Search... johndoe@t...

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 03/01/2021 02:21 PM

Incident Generation

#### Request Complete

You have chosen to contact the existing Filing Coordinator on your own. No automated action will be taken within My PAA, but you can follow up with incident [#210320-000010](#)

**Plan Details:**  
**Plan Name:** Testing 123 ABC  
**Plan ID:** 2373403  
**EIN/PN:** 987654321/111  
**Filing Coordinator Name:** Logan Smith

Exit Go to Plan List

# How to Create a New/Add Existing Plan to your Account

## New Plan/Add Existing Plan Information Page

### Add an Existing Plan

- ▶ If you choose to have My PAA send an automated email message to the existing Filing Coordinator, then no further action is required from you at this time.
- ▶ My PAA will send an automated email to the Filing Coordinator using the email address associated with their My PAA account.
- ▶ Please note the incident number associated with this request in case any follow up with the PBGC Customer Support Team is needed.
- ▶ You will be able to continue with any premium related action for the plan once the plan has been added to your Plan List.



# How to Create a New/Add Existing Plan to your Account

## New Plan/Add Existing Plan Information Page

### Add an Existing Plan

- ▶ If you choose to have assistance from a PBGC Customer Service agent, a representative will reach out to you as soon as possible, and no further action is required from you at this time.
- ▶ Please note the incident number associated with this request in case any follow up with the PBGC Customer Support Team is needed.
- ▶ You will be able to continue with any premium related action for the plan once the plan has been added to your Plan List.

Home Page Ask a Question Search... johndoe@t...

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 03/01/2021 02:21 PM

#### EIN/PN Lookup Results

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details, including the current Filing Coordinator are listed below.

**Plan Details:**  
**Plan Name:** Testing 123 ABC  
**EIN/PN:** 987654321/111  
**Filing Coordinator Name:** Logan Smith

Please select one of the following options:

- If you know the existing Filing Coordinator, contact them directly to add you to the filing team (no automated action will occur).
- Send the existing Filing Coordinator an email request to add you to the filing team.
- Request assistance from a PBGC Customer Service Agent.

Exit Next

Home Page Ask a Question Search... johndoe@t...

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 03/01/2021 02:21 PM

Incident Generation

#### Request Complete

An incident #210320-000012 has been opened to assist you with your request. A PBGC Customer Service Agent will contact you shortly.

**Plan Details:**  
**Plan Name:** Testing 123 ABC  
**Plan ID:** 2373403  
**EIN/PN:** 987654321/111  
**Filing Coordinator Name:** Logan Smith

Exit Go to Plan List

