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

Last Updated:
September 8th, 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.
Once you have logged in, click on the “Create New Plan/Add Existing Plan” icon or link from the Home Page.
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.
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.
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.
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.
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.
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)
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.
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.
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.