

# How to Create a New Plan and Add Existing Plan to Your Account

My Plan Administration Account (My PAA)

*Last Updated: May 06, 2024*





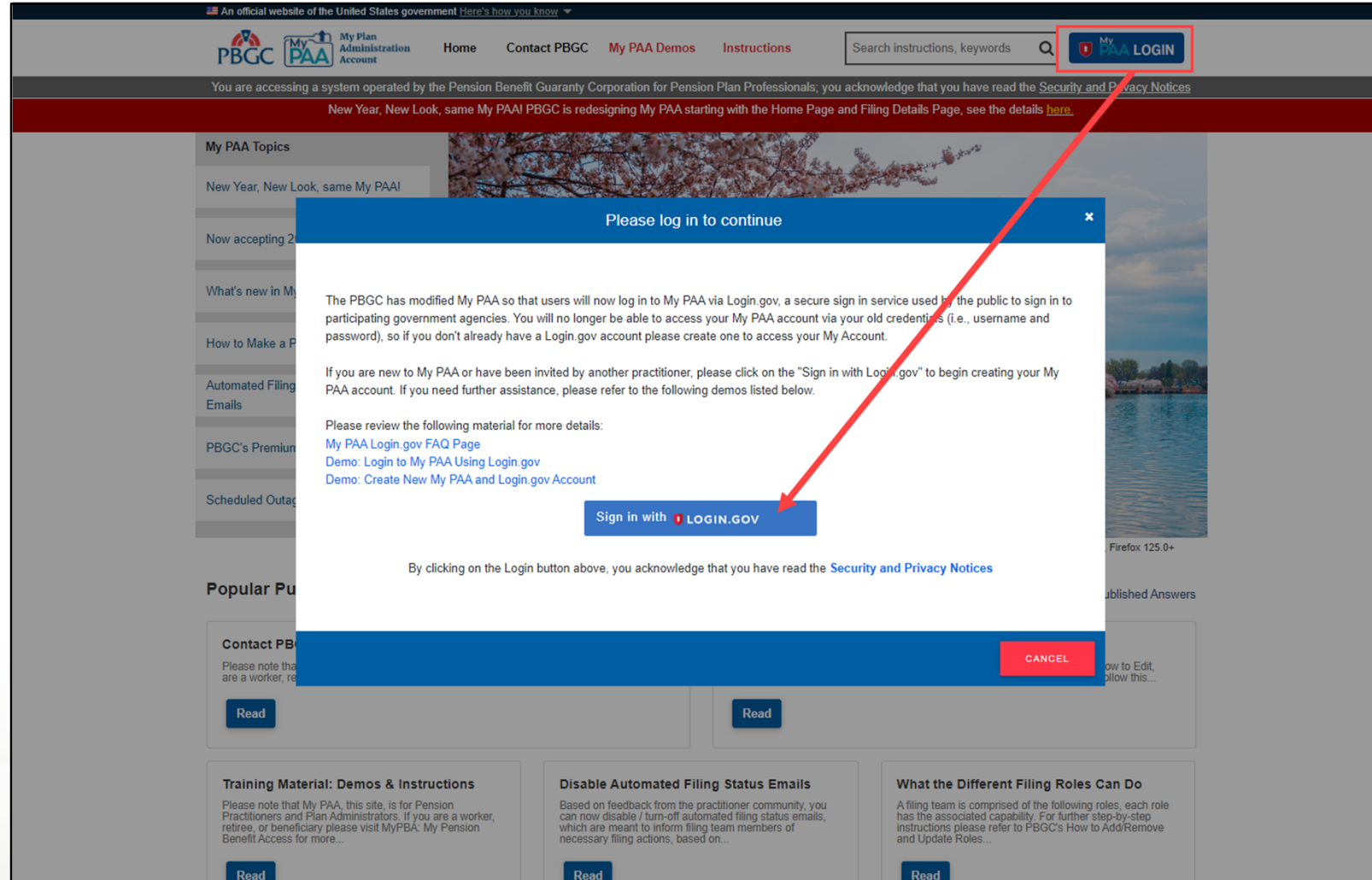
# Step-by-Step Instructions

PBGC

# How to Create a New Plan and Add Existing Plan to Your Account

## Login

- From the Home Page, click on the “My PAA Login” button to log in.
- You will need to log in to your Login.gov account to access your My PAA account.
  - For more details and step-by-step instructions on how to access your My PAA account via Login.gov please view PBGC’s [How to Log in to My PAA Using Login.gov?](#) Published Answer.



# How to Create a New Plan and Add Existing Plan to Your Account

## Create New / Add Existing Plan

- Once you have logged in to your My PAA account, click on the “Create New / Add Existing Plan” button from the Home Page.

The screenshot shows the My PAA account home page. At the top, there is a navigation bar with the PBGC logo, 'My PAA Account' text, and links for Home, Contact PBGC, My PAA Demos, and Instructions. A search bar and a user profile dropdown (jane.doe.sm...) are also present. Below the navigation bar, a red banner contains a message about the website redesign. The main content area features a large background image of cherry blossoms over a pond. On the left, there is a sidebar with 'My PAA Topics' including links for new look announcements, 2024 filings, login process updates, payment instructions, filing status transitions, disaster relief policy, and outages. On the right, a vertical menu of blue buttons is displayed: 'Create New / Add Existing Plan' (highlighted with a red box and arrow), 'Plan List', 'In-Process Filings', 'Upload or Import Filings', and 'View Upload History'. At the bottom, a footer section lists supported browsers and the release date.

An official website of the United States government [Here's how you know](#)

**PBGC** My PAA Account My Plan Administration Account

Home Contact PBGC My PAA Demos Instructions

Search instructions, keywords

jane.doe.sm...

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge that you have read the [Security and Privacy Notices](#)

New Year, New Look, same My PAA! PBGC is redesigning My PAA starting with the Home Page and Filing Details Page, see the details [here](#).

**My PAA Topics**

- New Year, New Look, same My PAA!
- Now accepting 2024 Filings
- What's new in My PAA & Login Process
- How to Make a Payment?
- Automated Filing Status Transitions and Emails
- PBGC's Premium Disaster Relief Policy
- Scheduled Outages

**Create New / Add Existing Plan**

**Plan List**

**In-Process Filings**

**Upload or Import Filings**

**View Upload History**

**Supported Browsers:** Google Chrome 124.0+, Microsoft Edge 124.0+, Firefox 125.0+ (Release 5.7 as of 04/21/2024)

# How to Create a New Plan and Add Existing Plan to Your Account

## Create New Plan / Add Existing Plan Page


- Once you have logged in, click on the "Create New Plan / Add Existing Plan" icon or link from the Home Page and you will be redirected to the "New Plan/Add Existing Plan Information" Page.

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

#### Plan Information

General Plan Information

Employer Identification Number (EIN): 

Plan Number (PN):

Exit

Next



# How to Create a New Plan and Add Existing Plan to Your Account

## 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

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

#### Plan Information

##### General Plan Information

Employer Identification Number (EIN):

123456789

Plan Number (PN):

001

Next

Exit

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

#### EIN/PN Summary

Please review the EIN/PN information you have entered below. If you need to correct the data, please navigate back. Otherwise, upon submission, we will verify if this EIN/PN combination already exists in PBGC records and provide options with how to proceed.

**EIN/PN:** 123456789 / 001

Back

Next

Exit



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# How to Create a New Plan and Add Existing Plan 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
  - Effective Date
  - Plan Name
  - Plan Admin Name, Email Address, Phone Number and Mailing Address
- Once the information has been provided and validated, click the "Next" button.

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

#### EIN/PN Summary

Please review the EIN/PN information you have entered below. If you need to correct the data, please navigate back. Otherwise, upon submission, we will verify if this EIN/PN combination already exists in PBGC records and provide options with how to proceed.

EIN/PN: 123123123 / 123

Back

Next

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 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

Effective Date:

Note: The Effective Date entered here will prepopulate as item 4(d) on the Comprehensive Premium Filing when submitting the first year filing in My PAA. You can edit the Effective Date at that time, but you will receive a warning and/or notice from the PBGC explaining the inconsistency, as PBGC records will need to be updated. Please confirm you are entering the correct date the Defined Benefit plan actually became effective. ⚠

mm dd yyyy

Plan Name:

#### Plan Admin Information

Admin's Name:

% Email Address:

% Phone Number:

Address 1:

Address 2:

Country:

United States (US)

City:

State:

Zip Code:

Next

Exit



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# How to Create a New Plan and Add Existing Plan to Your Account

## New Plan/Add Existing Plan Information Page

### Add a New Plan

- Once the information has been provided and validated, click the “Next” button to complete the plan creation captcha and submit.

**New Plan/Add Existing Plan Information**  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 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**

Effective Date:

Note: The Effective Date entered here will prepopulate as item 4(d) on the Comprehensive Premium Filing when submitting the first year filing in My PAA. You can edit the Effective Date at that time, but you will receive a warning and/or notice from the PBGC explaining the inconsistency, as PBGC records will need to be updated. Please confirm you are entering the correct date the Defined Benefit plan actually became effective.

01 ▼ 01 ▼ 2023 ▼

Plan Name:  
JS Testing Plan

**Plan Admin Information**

Admin's Name:  
John Smith

John Smith's Email Address:  
pbgcyz@gmail.com

John Smith's Phone Number:  
(123) 456-7890

Address 1:  
123 John st

Address 2:

Country: United States (US) ▼ City: Washington State: DC ▼ Zip Code: 20000

**Next**

**Exit**

**New Plan/Add Existing Plan Information**  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

**Plan Creation Captcha**

Please enter the following text:

qp8byu

**Back**

**Submit**

**Exit**



# How to Create a New Plan and Add Existing Plan to Your Account

## New Plan/Add Existing Plan Information Page

### Add a New Plan

- Enter the Captcha text, and then click the “Submit” 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.

New Plan/Add Existing Plan Information  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Creation Captcha  
Please enter the following text:  
78te0h  
78te0h

Back Submit Exit

New Plan/Add Existing Plan Information  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 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](#).

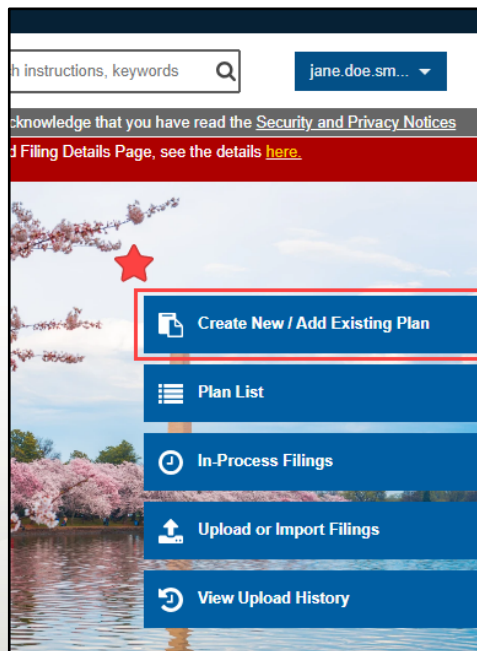
Plan Details:  
Plan Name: JS Testting Plan  
EIN/PN: 123456789/123  
Effective Date: 01/01/2023

Back to Plans List Exit

# How to Create a New Plan and Add Existing Plan to Your Account

## Create New Plan / Add Existing Plan Page

- Once you have logged in, click on the "Create New Plan / Add Existing Plan" icon or link from the Home Page and you will be redirected to the "New Plan/Add Existing Plan Information" Page.




## New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

### Plan Information

#### General Plan Information

Employer Identification Number (EIN): 

Plan Number (PN):

Next

Exit

# How to Create a New Plan and Add Existing Plan to Your Account

## Create New Plan / Add Existing Plan Page

### Add an Existing Plan

- Enter the 9-digit Employer Identification Number (EIN), and the 3-digit Plan Number (PN) for the plan. Then click “Next.”
- You will be directed to a Summary Page to confirm the EIN/PN you entered on the previous screen.

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

#### Plan Information

##### General Plan Information

Employer Identification Number (EIN):

123456789

Plan Number (PN):

001

Next

Exit

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

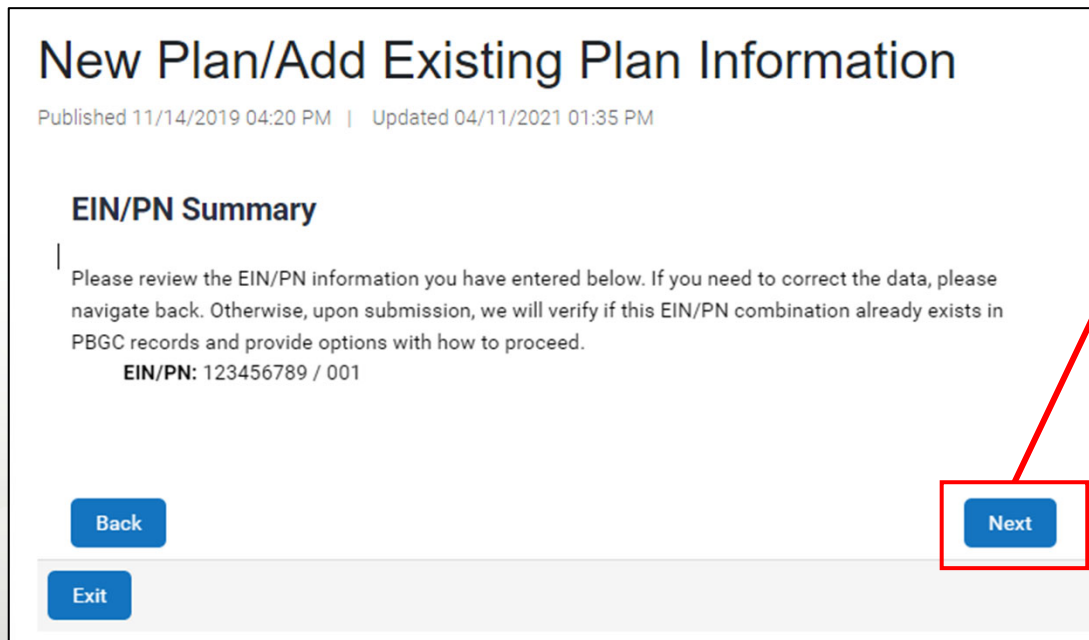
#### EIN/PN Summary

# How to Create a New Plan and Add Existing Plan to Your Account

## Create New Plan / Add Existing Plan Page

### Add an Existing Plan

- On the 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 directed to the EIN/PN Lookup Result page



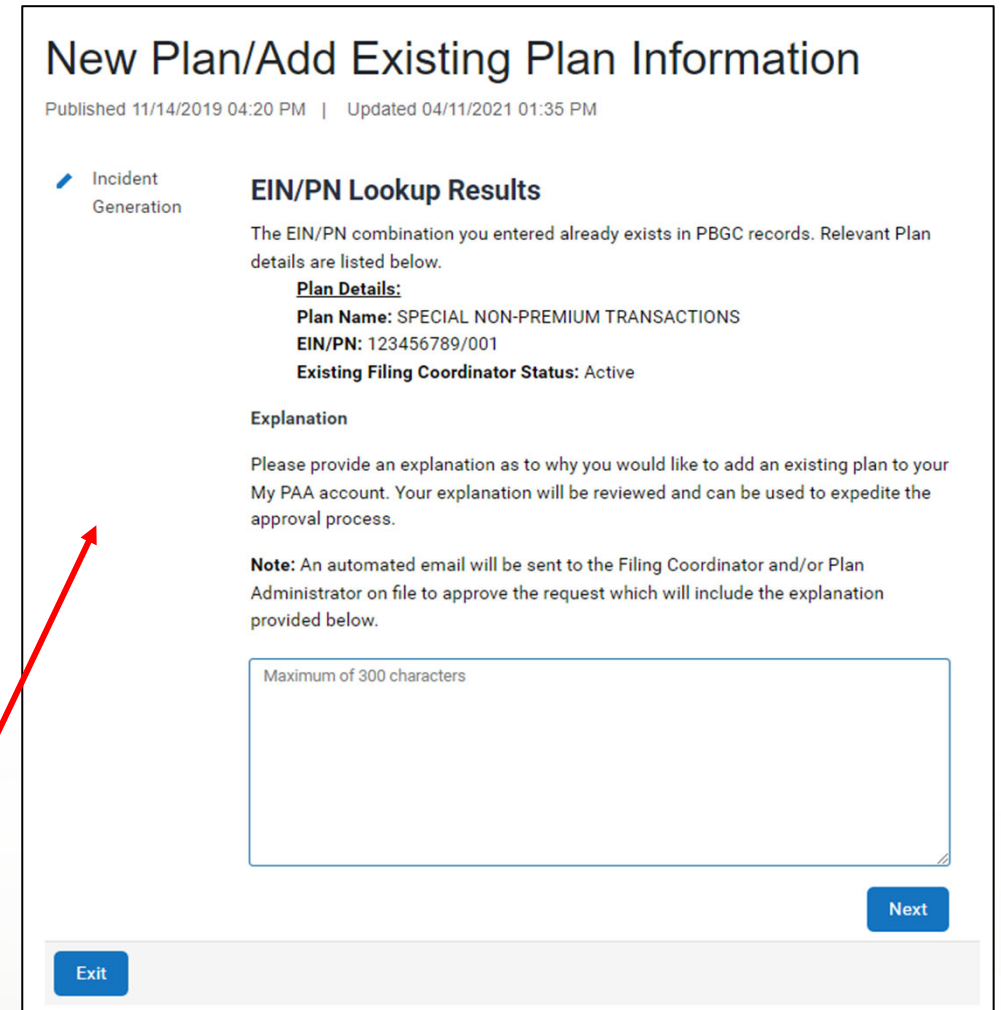
**New Plan/Add Existing Plan Information**  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

**EIN/PN Summary**

Please review the EIN/PN information you have entered below. If you need to correct the data, please navigate back. Otherwise, upon submission, we will verify if this EIN/PN combination already exists in PBGC records and provide options with how to proceed.

**EIN/PN: 123456789 / 001**

[Back](#) [Next](#) [Exit](#)



**New Plan/Add Existing Plan Information**  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

[Incident Generation](#)

**EIN/PN Lookup Results**

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details are listed below.

**Plan Details:**  
**Plan Name:** SPECIAL NON-PREMIUM TRANSACTIONS  
**EIN/PN:** 123456789/001  
**Existing Filing Coordinator Status:** Active

**Explanation**

Please provide an explanation as to why you would like to add an existing plan to your My PAA account. Your explanation will be reviewed and can be used to expedite the approval process.

**Note:** An automated email will be sent to the Filing Coordinator and/or Plan Administrator on file to approve the request which will include the explanation provided below.

Maximum of 300 characters

[Exit](#) [Next](#)


# How to Create a New Plan and Add Existing Plan to Your Account

## Create New Plan / Add Existing Plan Page

### Add an Existing Plan: Active Filing Coordinator

- Confirm the Plan Details on the EIN/PN Lookup Results Page
  - Plan name
  - EIN/PN
  - Existing FC Status: **Active**
- Enter the mandatory explanation (300 characters max).
- Click “Next” to continue to the Plan Creation Captcha page.

**New Plan/Add Existing Plan Information**  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

 Incident Generation

**EIN/PN Lookup Results**

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details are listed below.


Plan Details:  
**Plan Name:** SPECIAL NON-PREMIUM TRANSACTIONS  
**EIN/PN:** 123456789/001  
**Existing Filing Coordinator Status:** Active


**Explanation**

Please provide an explanation as to why you would like to add an existing plan to your My PAA account. Your explanation will be reviewed and can be used to expedite the approval process.

**Note:** An automated email will be sent to the Filing Coordinator and/or Plan Administrator on file to approve the request which will include the explanation provided below.

Mandatory Explanation: Max 300 characters

 Next

 Exit

**Existing Filing Coordinator Status: Active**

## New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

### Plan Creation Captcha

Please enter the following text:



Submit



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# How to Create a New Plan and Add Existing Plan to Your Account

## New Plan/Add Existing Plan Information Page


### Add an Existing Plan: Active Filing Coordinator

- My PAA will send an automated email message to the existing Filing Coordinator to grant you access to the Plan.
- 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 begin any premium related action for the plan once the plan has been added to your My PAA account by the plan's Filing Coordinator or a PBGC Customer Service Agent with authorization from the plan.

**New Plan/Add Existing Plan Information**  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

**Plan Creation Captcha**  
Please enter the following text:  


**New Plan/Add Existing Plan Information**  
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

 Incident Generation

**Request Complete**

An incident [#230821-000012](#) has been opened to track your request. An email will be sent to the existing Filing Coordinator and/or Plan Administrator with your request and explanation to be added to the Filing Team. An existing Filing Coordinator must invite you before gaining access to the Plan via My PAA.

Plan Details:  
**Plan Name:** SPECIAL NON-PREMIUM TRANSACTIONS  
**Plan ID:** 86264  
**EIN/PN:** 123456789/001  
**Existing Filing Coordinator Status:** Active

# How to Create a New Plan and Add Existing Plan to Your Account

## Create New Plan / Add Existing Plan Page

### Add an Existing Plan: Inactive Filing Coordinator

- On the Lookup Results Page to confirm the Plan Details.
  - Plan name
  - EIN/PN
  - Existing FC Status: Inactive
- Enter the mandatory explanation (300 characters max).
- Click “Next” to continue to the Plan Creation Captcha page.

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Incident Generation

#### EIN/PN Lookup Results

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details are listed below.

**Plan Details:**  
**Plan Name:** TEST PLAN I  
**EIN/PN:** 777777777/777  
**Existing Filing Coordinator Status:** Inactive

#### Explanation

Please provide an explanation as to why you would like to add an existing plan to your My PAA account. Your explanation will be reviewed and can be used to expedite the approval process.

**Note:** An automated email will be sent to the Filing Coordinator and/or Plan Administrator on file to approve the request which will include the explanation provided below.

Maximum of 300 characters

This value is mandatory.

**Next**

**Exit**

**Existing Filing Coordinator Status: Inactive**

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

#### Plan Creation Captcha

Please enter the following text:



# How to Create a New Plan and Add Existing Plan to Your Account

## New Plan/Add Existing Plan Information Page

### Add an Existing Plan: Inactive Filing Coordinator


- My PAA will send the incident to a PBGC Customer Service agent if there is no existing Filing Coordinator. No action is required from you at this time, the PBGC Customer Service agent will contact you.
- 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 begin any premium related action for the plan once the plan has been added to your My PAA account by a PBGC Customer Service Agent with authorization from the plan.

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

**Plan Creation Captcha**

Please enter the following text:




qrpgle

[Exit](#) [Submit](#)

### New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

 Incident Generation

#### Request Complete

An incident [#230821-000015](#) has been opened to track your request. A PBGC Customer Service Agent will contact you shortly since there is no active Filing Coordinator for this Plan.

**Plan Details:**  
**Plan Name:** TEST PLAN I  
**Plan ID:** 2853796  
**EIN/PN:** 77777777/777  
**Existing Filing Coordinator Status:** Inactive

[Exit](#) [Go to Plan List](#)