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

My Plan Administration Account (My PAA)
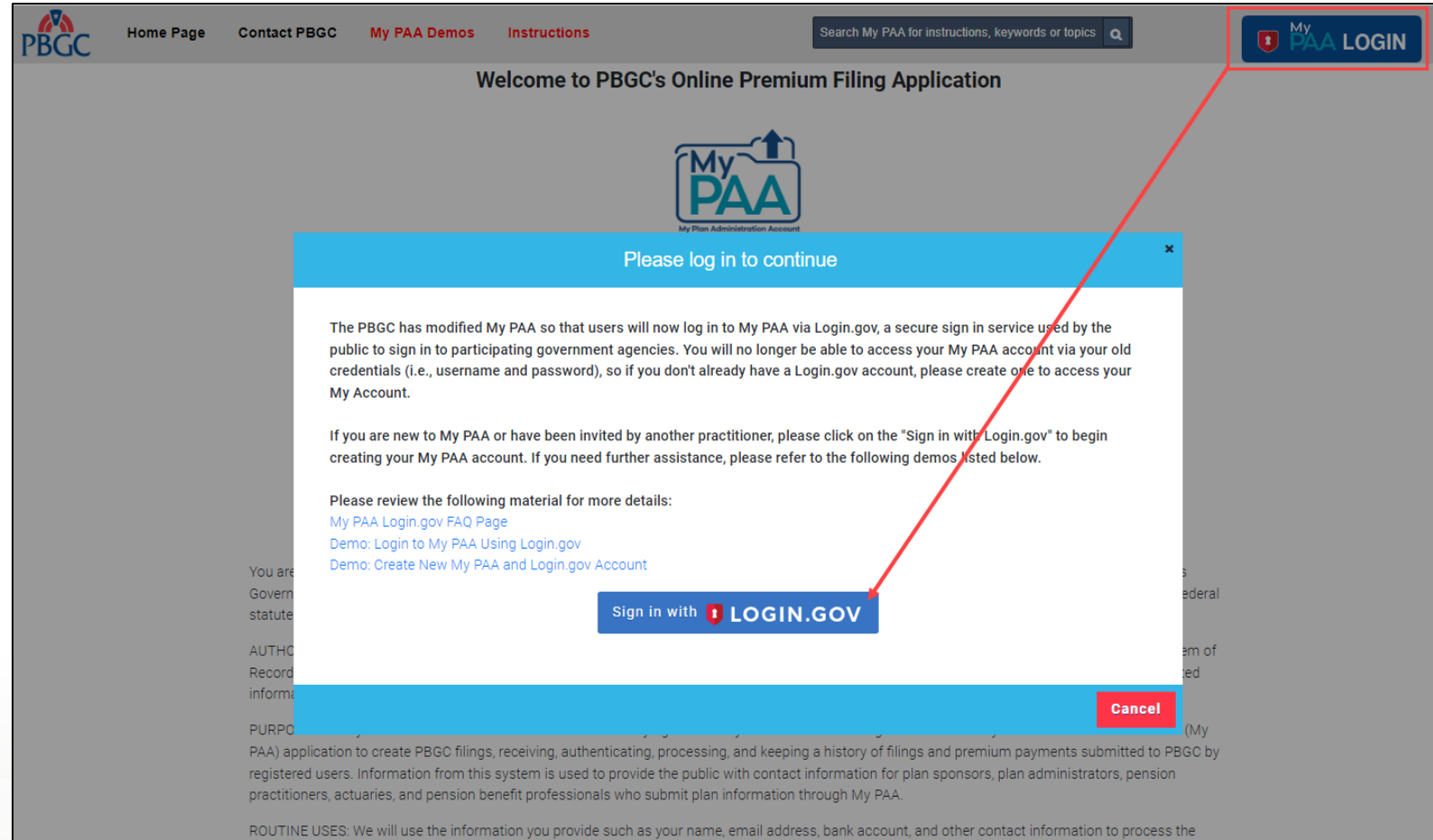
Last Updated: August 21, 2023

PBGC Pension Benefit Guaranty Corporation

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.

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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

Create New Plan / Add Existing Plan

Plan List

In-Process

Upload Filings

View Upload History

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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
  - 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.

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New Plan/Add Existing Plan Information Page

Add a New Plan

- Fill out the 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.

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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

Back   Submit
Exit

New Plan/Add Existing Plan Information
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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

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Create New Plan / Add Existing Plan Page

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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

Create New Plan / Add Existing Plan   Plan List   In-Process   Upload Filings   View Upload History

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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
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Plan Information

General Plan Information

Employer Identification Number (EIN):
123456789

Plan Number (PN):
001

Next

Exit

New Plan/Add Existing Plan Information
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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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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
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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
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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

Next

Exit

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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.

Existing Filing Coordinator Status: Active

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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
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Plan Creation Captcha
Please enter the following text:

reaoxe

[reaoxe]

Submit

Exit

New Plan/Add Existing Plan Information
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✏️ 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

Go to Plan List

Exit

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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.

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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
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Plan Creation Captcha
Please enter the following text:

qrpg1c

Submit

Exit

New Plan/Add Existing Plan Information
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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: 777777777/777
Existing Filing Coordinator Status: Inactive

Go to Plan List

Exit

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