

# How to Utilize the Plan List Page

My Plan Administration Account (My PAA)

*Last Updated: July 30, 2024*





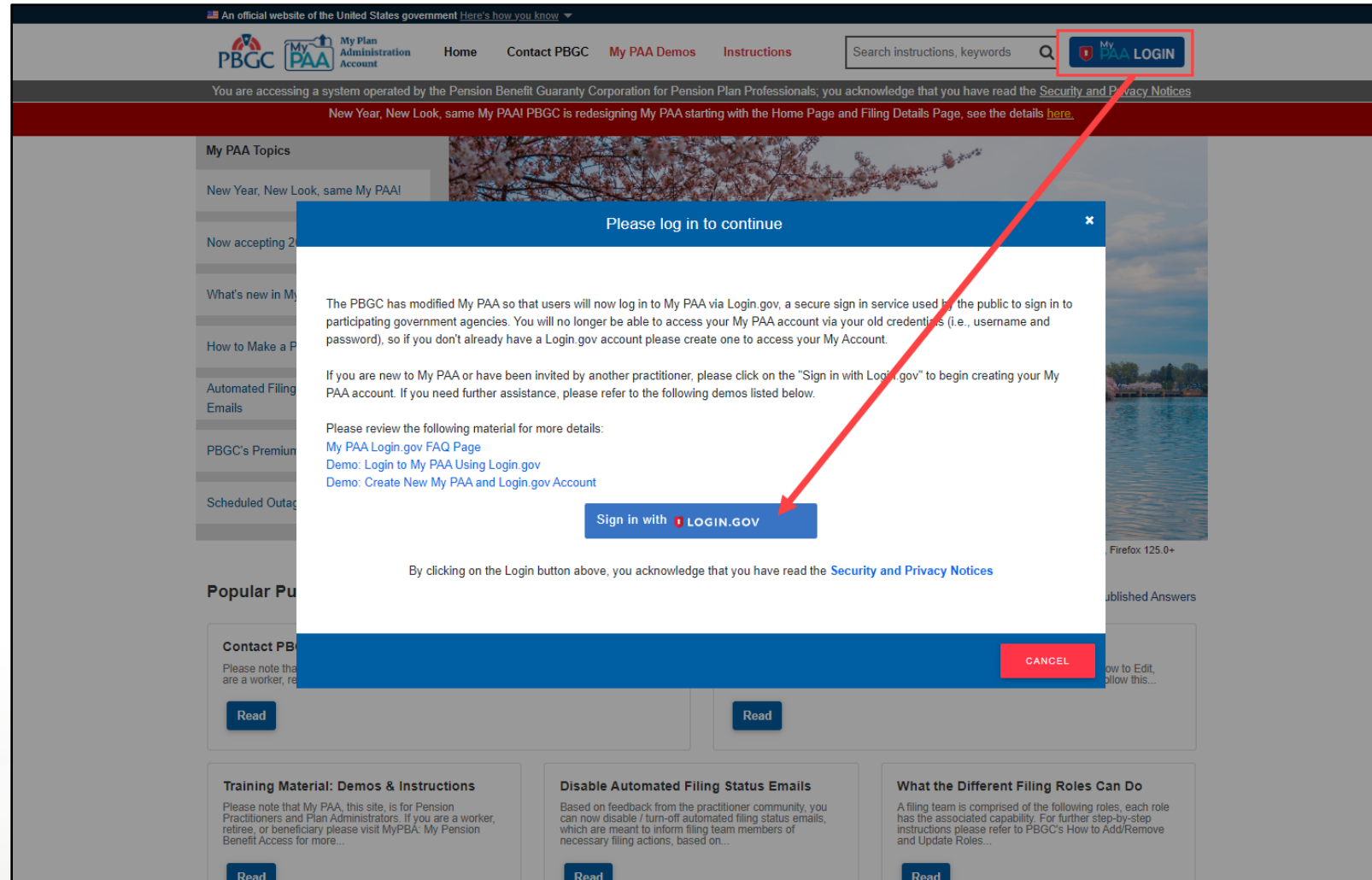
# Step-by-Step Instructions

PBGC

# How to Utilize the Plan List Page

## 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 Utilize the Plan List Page

## Plan List Page

- Once you have logged in to your My PAA account, click on the “Plan List” icon or link from the Home Page.

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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 Utilize the Plan List Page

## Plan List Page

- A list of all the My PAA plans you are associated with will appear on this page.
  - The default view of your plans will be sorted by the “Latest Filing Update” date (descending).
- You can customize and filter the view of your Plan List Page by using the following features:
  1. By default, the Plan List Page will show up to 10 plans per page. If you are associated with more than 10 plans, you can click on the entries drop down menu to view up to 100 plans at one time.
  2. You can use the search bar to show a specific plan or group of plans, by entering any part of the Plan ID, EIN, Plan Name, Last Filing Update, Latest Filing ID, Latest PYC or Latest Filing Status.
  3. You can view plans based on one or more filing status by using the Latest Filing Status Filter. These filter options will be hidden, you must click on the “Filter by Latest Filing Status” link to reveal.
    - It is important to note that not all of the filing statuses may be listed in this filter. These are populated based on if you have a filing associated with that status at the time of viewing your Plan List.
  4. You can sort the following columns in ascending or descending order:
    - Plan ID, EIN, PN, Name, Latest Filing Update, Latest Filing ID, Latest PYC, Latest Filing Status

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### Plans in your My PAA Account

The below list consists of all of your Plans. You can use the Create New Filing column buttons to create new filings based on your Role. You can use the Latest Filing Status column buttons to complete the next step for each Filing based on your Role(s). Use the Links in the Filing ID and Plan Name columns to see its corresponding details page.

3 **Filter by Latest Filing Status**  
☐ Draft ☐ Pending Admin Approval ☐ Submitted

1 Show 10 entries 2 Search:

	Plan ID	EIN	PN	Plan Name	Latest Filing Update	Latest Filing ID	Latest PYC	Latest Filing Status
	2420303	131311313	121	<a href="#">MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN UPDATE</a>	07/30/2024	<a href="#">502386</a>	01/02/2022	<a href="#">Pending Admin Approval</a>
	86264	123456789	001	<a href="#">SPECIAL NON-PREMIUM TRANSACTIONS</a>	06/05/2024	<a href="#">500753</a>	01/01/2022	Submitted
	2420311	898989898	898	<a href="#">PRACTITIONER REMOVED FROM ANOTHER PLAN</a>	11/01/2023	<a href="#">506658</a>	01/01/2023	<a href="#">Draft</a>

Showing 1 to 3 of 3 entries

First 1 Last



# How to Utilize the Plan List Page

## Plan Information

- The information highlighted in the image to the right will contain the plan information associated with your plan:
  - Plan ID, EIN, PN and Plan Name
- If you click on the Plan Name link, then it will bring you to the associated Plan Details Page.
  - From the Plan Details Page, you will be able to complete premium-related tasks associated with your selected plan. For more details, please view [PBGC's My PAA Demos Page](#).

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Filter by Latest Filing Status

Show 10 entries Search:

Create New Filing	Plan ID	EIN	PN	Plan Name	Latest Filing Update	Latest Filing ID	Latest PYC	Latest Filing Status
	2420303	131311313	121	<a href="#">MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN UPDATE</a>	07/30/2024	<a href="#">502386</a>	01/02/2022	<a href="#">Pending Admin Approval</a>
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# How to Utilize the Plan List Page

## Filing Information

1. Users have the ability to jump straight into a new filing interview from the Plan Details Page by clicking on the “Create New Filing” icon to the left of the corresponding plan you wish to file for.
  - If the “Create new Filing” icon is grayed out, then you do not have the Filing Preparer role. Please view the [“How to Add and Remove and Update Roles for Filing Member”](#) demo for more details.
2. My PAA has also provided details for the most recently updated filing associated with that plan (i.e., in the same row). The following headers are all associated with the most recently updated filing:
  - Latest Filing Update, Latest Filing ID, Latest PYC, Latest Filing Status.
- If you click on the Latest Filing ID link, then it will bring you to the associated Filing Details Page.
  - From the Filing Details Page, you will be able to view the filing task history, filing summary, review/edit the associated filing and more. For more details, please view the My PAA demo, [How to Review, Return for Edit, Certify and Submit a Filing](#).
  - Any upload filing(s) that is not currently in “Submitted” status will not have a clickable Filing ID link. You will have to view this from the [Upload History Page](#).

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## Latest Filing Status of the Most Recently Edited Filing

- The Latest Filing Status Filter at the top of the Plan List Page allows users to select one or more available status to filter your plan view.
  - The search parameters will not display by default. You must click on the “Filter by Latest Filing Status” link to reveal the options.
- It is important to note that not all the filing statuses may be listed in this filter. These are populated based on whether you have a filing associated with that status at the time of viewing your Plan List.
- A plan’s filing status field may be blank if:
  - It is a new plan, and it does not have any in process/submitted filings, or
  - A filing has been created, however, the Filing Preparer never arrived to the “Plan Year Details” page before exiting the interview (as a result, the PYC field will also be blank).

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☐ Draft ☐ Pending Admin Approval ☐ Submitted

Show 10 entries Search:

Create New Filing	Plan ID	EIN	PN	Plan Name	Latest Filing Update	Latest Filing ID	Latest PYC	Latest Filing Status
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