How to Utilize the Plan List Page

My Plan Administration Account (My PAA)

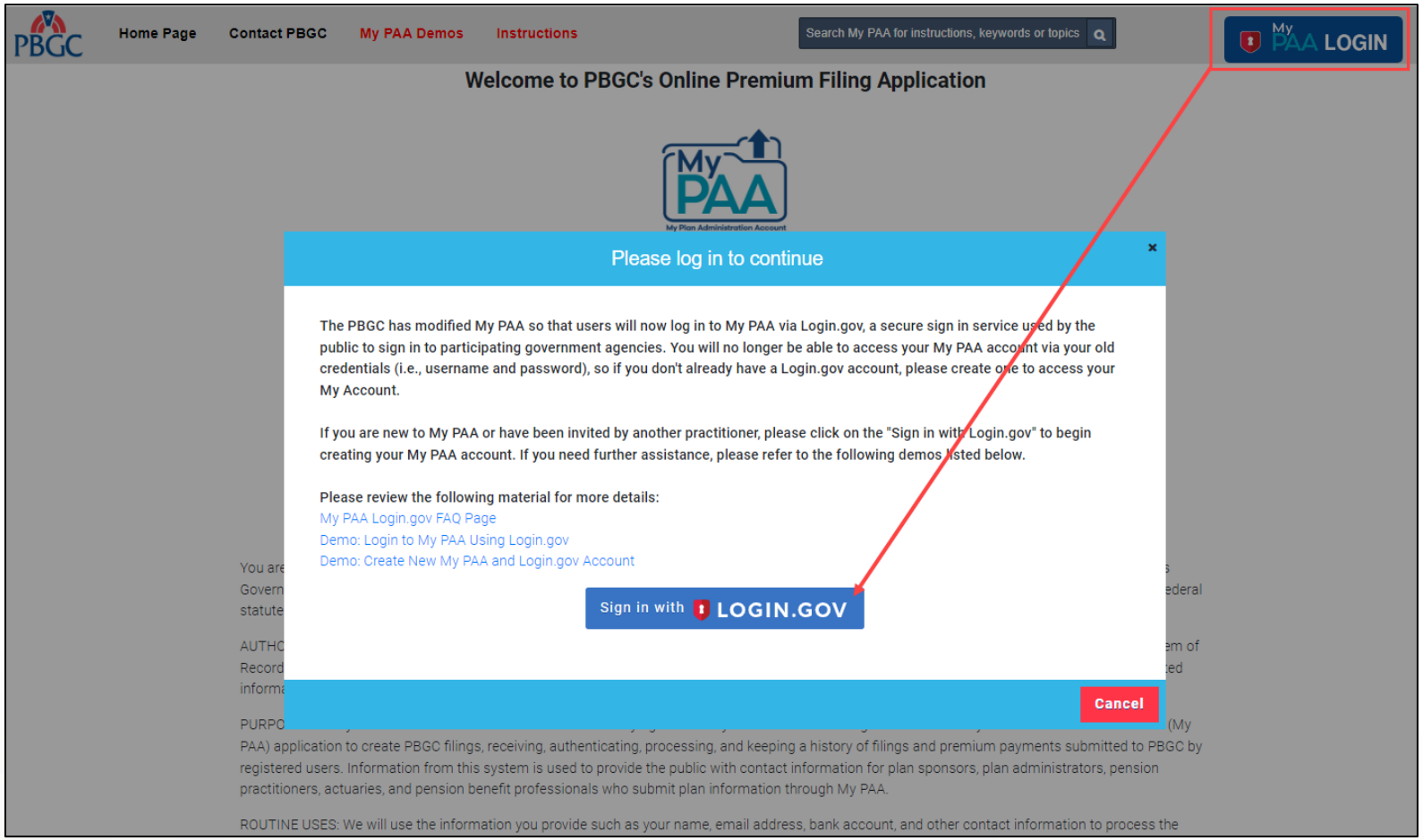
Last Updated: April 21, 2023

PBGC Pension Benefit Guaranty Corporation

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.



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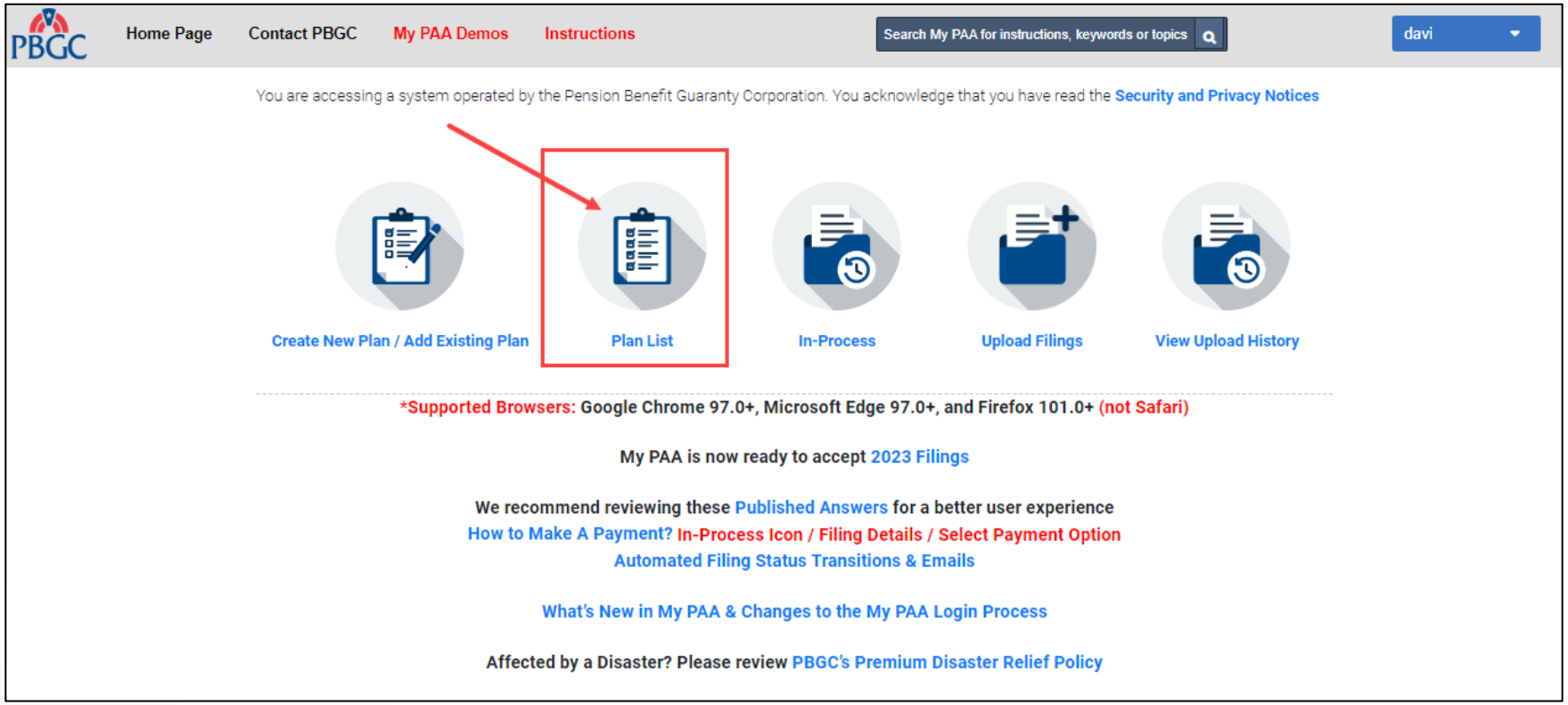
How to Utilize the Plan List Page

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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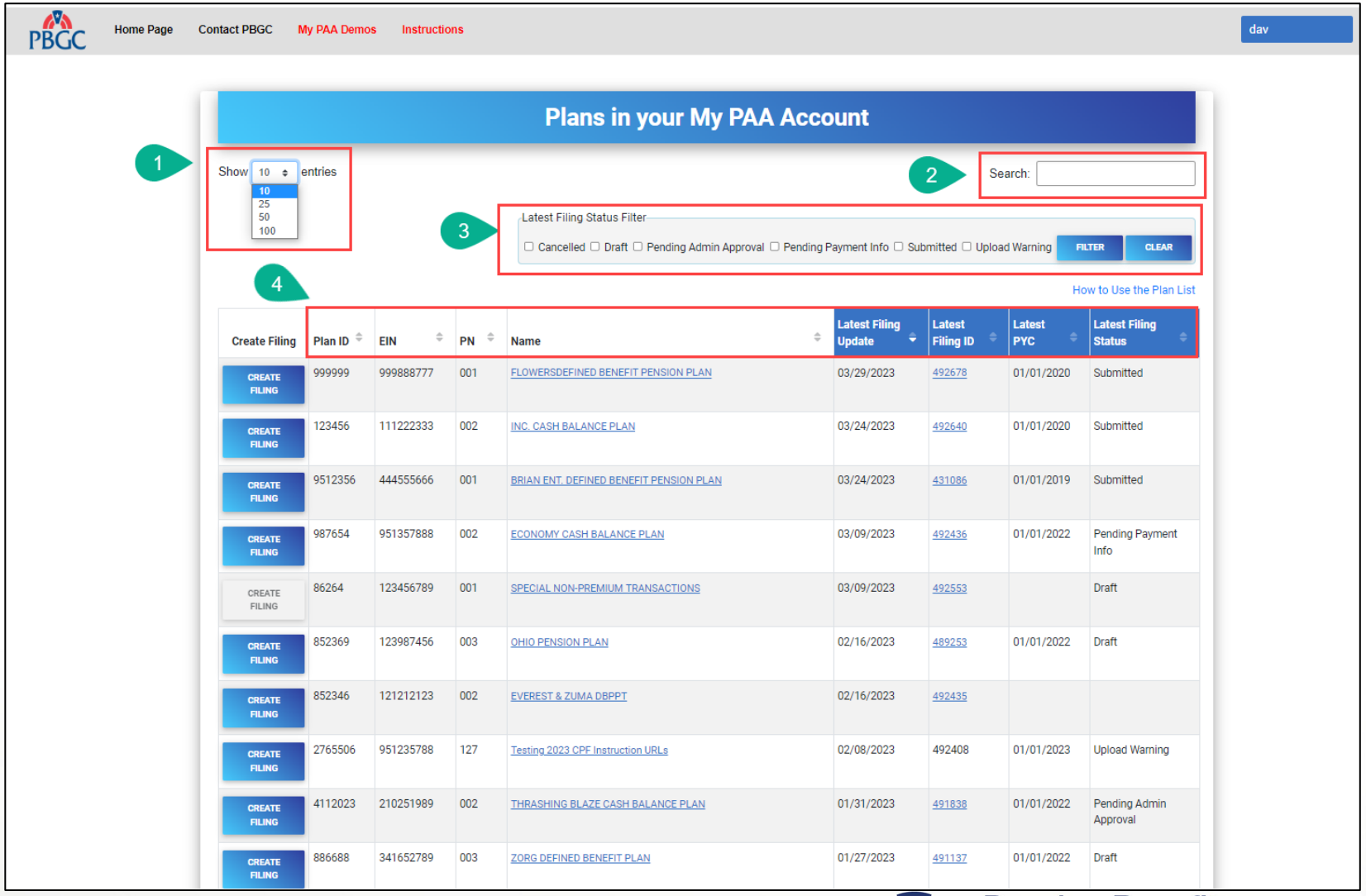
Plan List Page

- 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 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 of plans based on one or more filing status by using the Latest Filing Status Filter.
     - 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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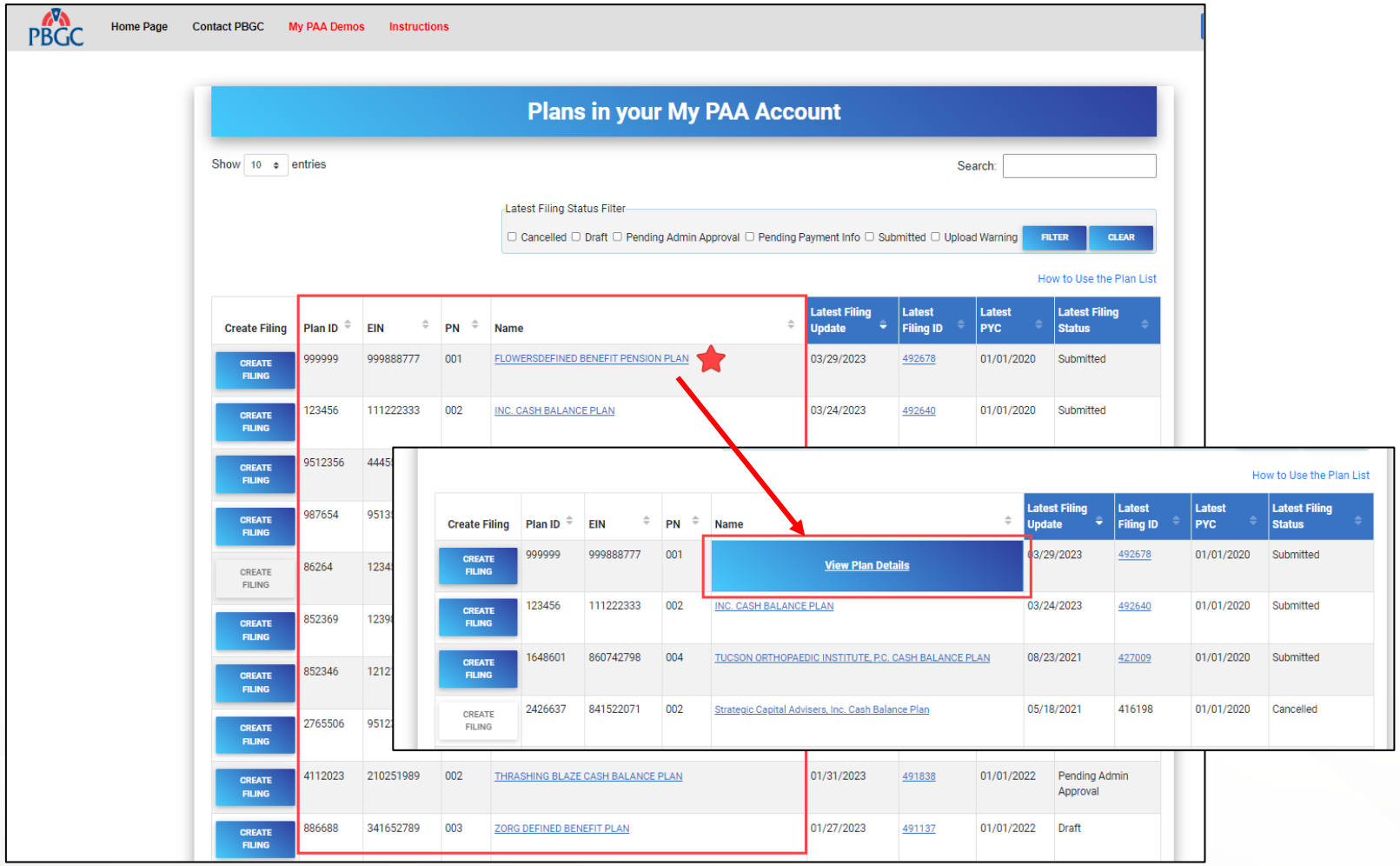
How to Utilize the Plan List Page

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 hover over the plan name, you will be able to click on “View Plan Details” link that appears, which 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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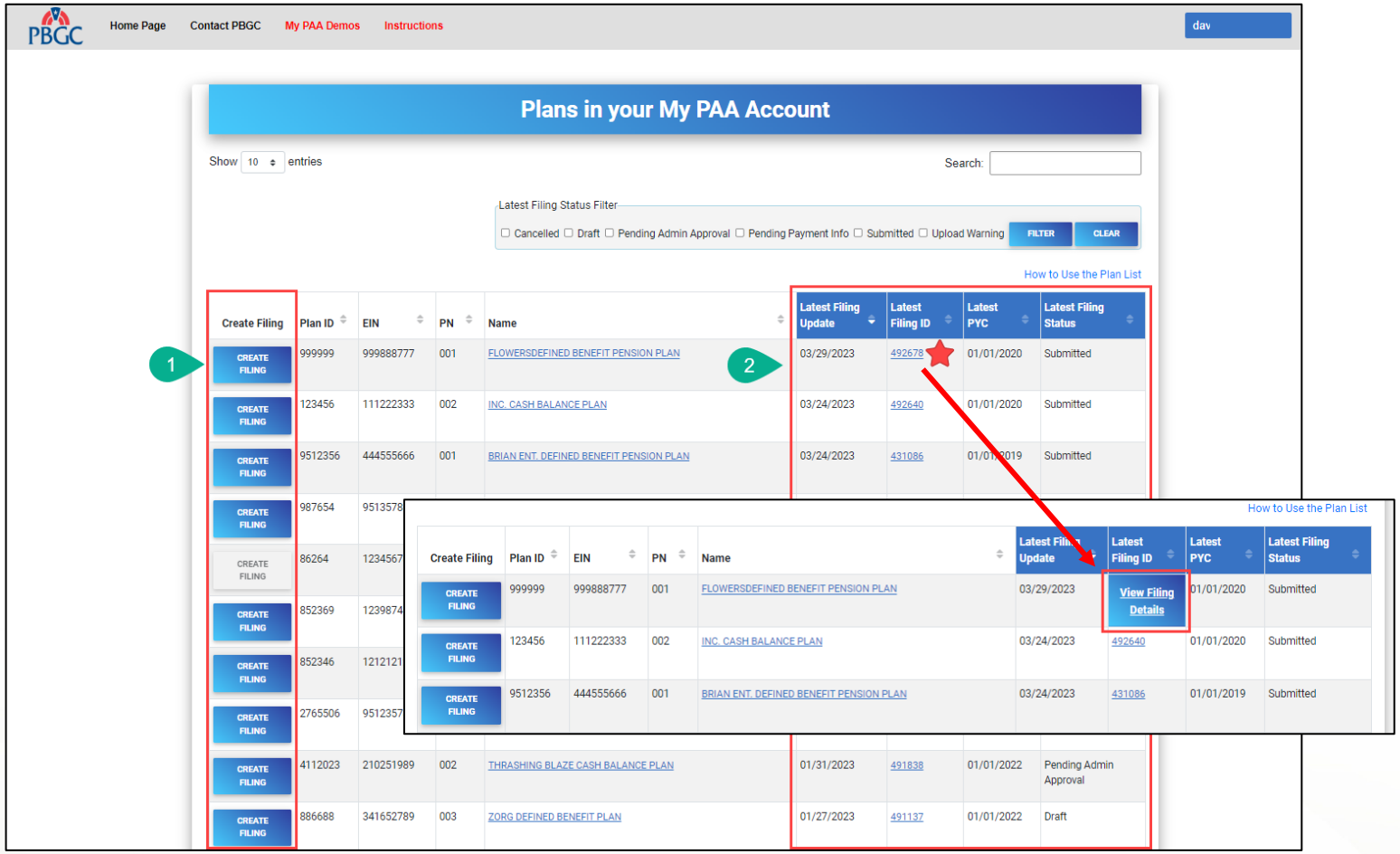
Filing Information

1. Users have the ability to jump straight into a new filing interview from the Plan Details Page by clicking on the “Create Filing” button to the left of the corresponding plan you wish to file for.
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 hover over the Filing ID, you will be able to click on “View Filing Details” link that appears, which 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 “View Filing Details” hyperlink. You will have to view this from the Upload History Page.



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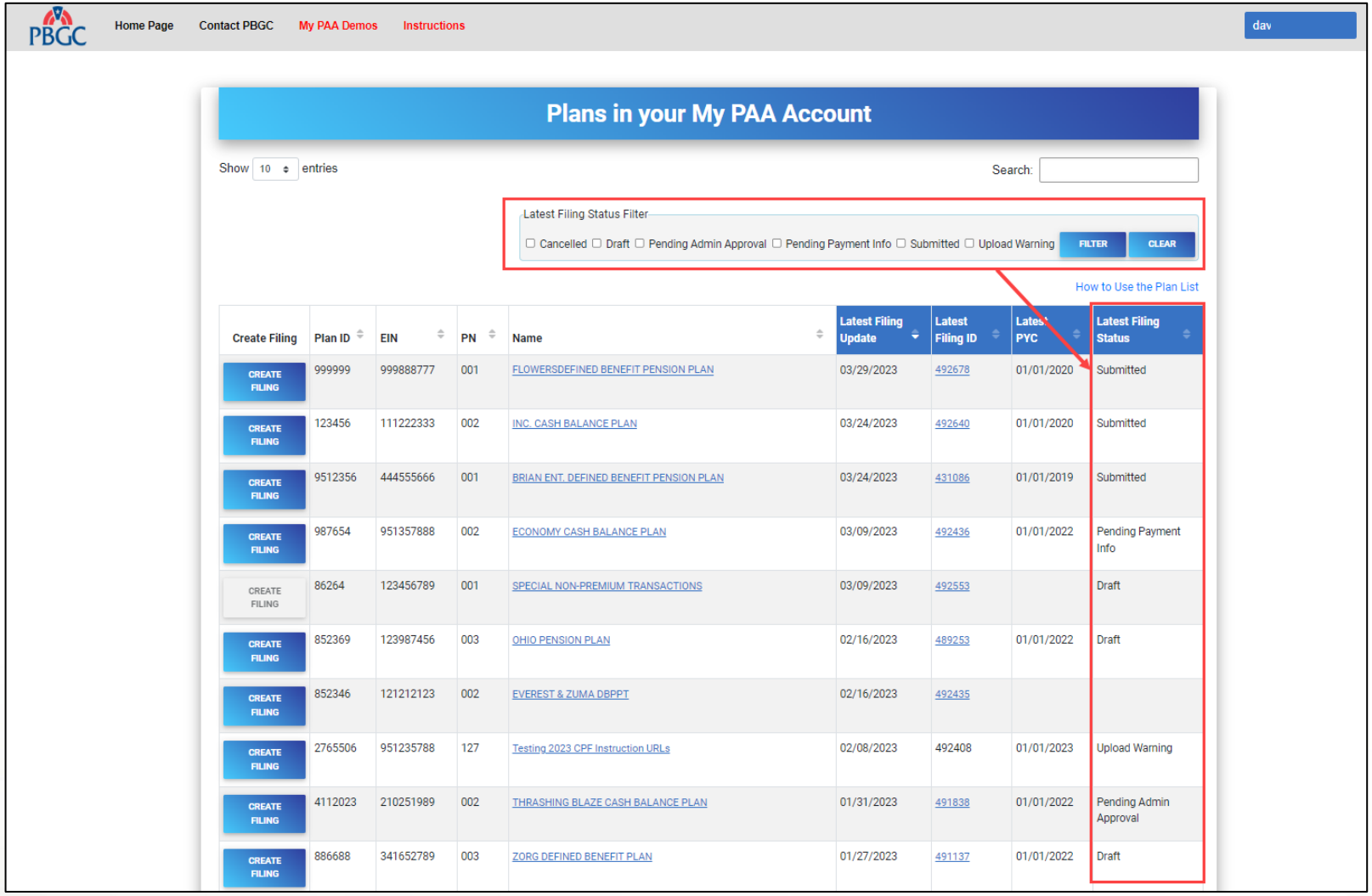
Latest Filing Status of the Most Recently Edited Filing

- 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.
  - It is important to note that not all of 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).



Create Filing	Plan ID	EIN	PN	Name	Latest Filing Update	Latest Filing ID	Latest PYC	Latest Filing Status
CREATE FILING	999999	999888777	001	FLOWERSDEFINED BENEFIT PENSION PLAN	03/29/2023	492678	01/01/2020	Submitted
CREATE FILING	123456	111222333	002	INC. CASH BALANCE PLAN	03/24/2023	492640	01/01/2020	Submitted
CREATE FILING	9512356	444555666	001	BRIAN ENT. DEFINED BENEFIT PENSION PLAN	03/24/2023	431086	01/01/2019	Submitted
CREATE FILING	987654	951357888	002	ECONOMY CASH BALANCE PLAN	03/09/2023	492436	01/01/2022	Pending Payment Info
CREATE FILING	86264	123456789	001	SPECIAL NON-PREMIUM TRANSACTIONS	03/09/2023	492553		Draft
CREATE FILING	852369	123987456	003	OHIO PENSION PLAN	02/16/2023	489253	01/01/2022	Draft
CREATE FILING	852346	121212123	002	EVEREST & ZUMA DBPPT	02/16/2023	492435		
CREATE FILING	2765506	951235788	127	Testing 2023 CPF Instruction URLs	02/08/2023	492408	01/01/2023	Upload Warning
CREATE FILING	4112023	210251989	002	THRASHING BLAZE CASH BALANCE PLAN	01/31/2023	491838	01/01/2022	Pending Admin Approval
CREATE FILING	886688	341652789	003	ZORG DEFINED BENEFIT PLAN	01/27/2023	491137	01/01/2022	Draft

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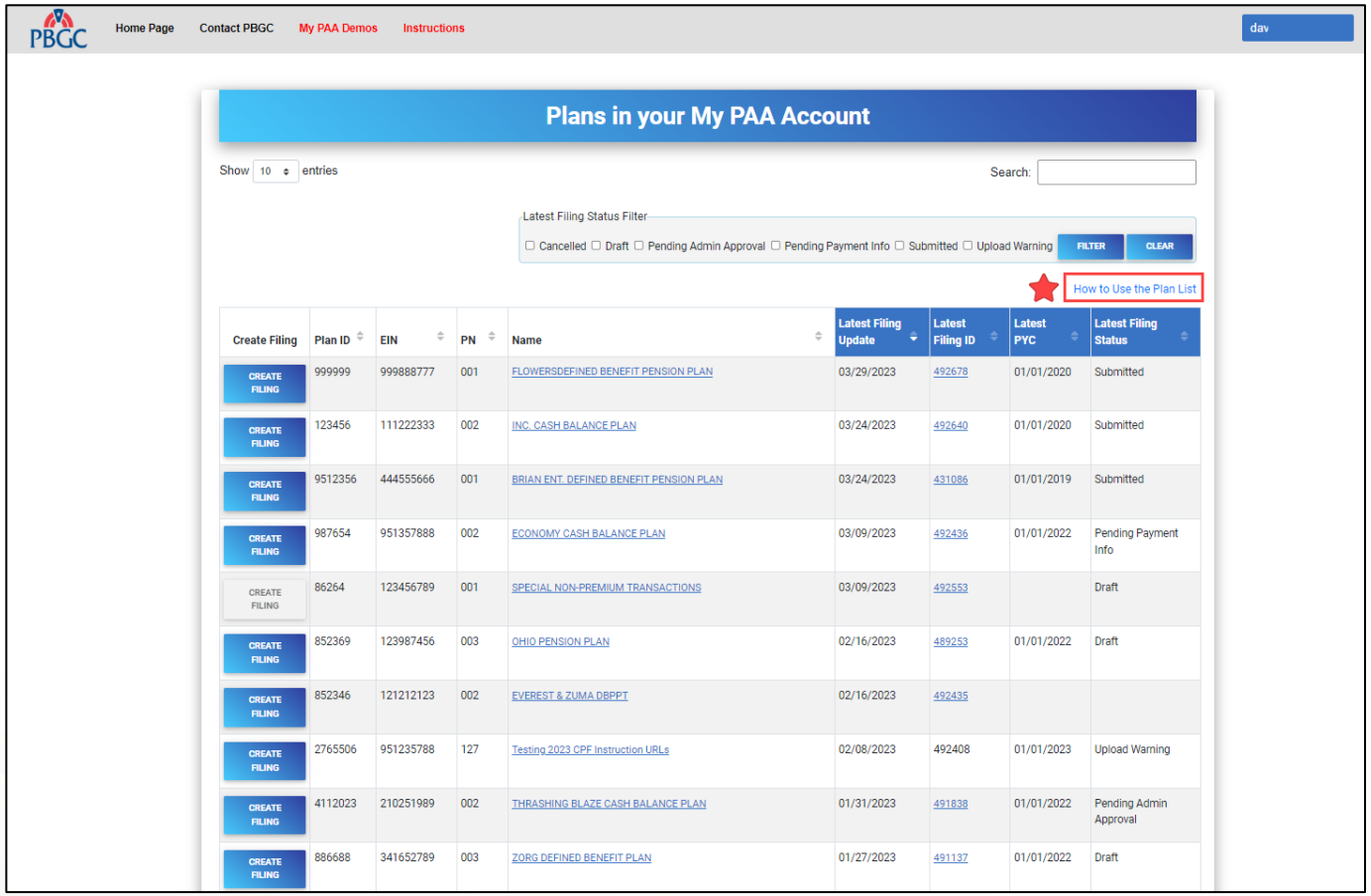
How to Utilize the Plan List Page

How to Use the Plan List Link

- If you would like a text version of this PDF document or would like a quick outline of utilizing the Plan List Page, a Published Answer, How to Use the Plan List Page, is linked under the "Latest Filing Status Filter."
  - A link to this demo will also be provided in the associated KMT.



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