How to Edit/Delete a Filing
My Plan Administration Account (My PAA)

Last Updated:
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How to Edit a Filing

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 login pop-up.
- Enter your Password into the field labeled "Password."
- Click on the "Log in" button.
Plan List Page

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

- From the Plan List Page, click on the “Plan Details” link for the plan you would like to certify, approve and/or submit a filing for.
How to Edit a Filing

Plan Details Page

- All Comprehensive Premium Filings associated with the plan will be displayed on the Plan Details Page.

- Click on the “Filing Details” button for the filing you want to edit or update.
  - Note: You may only edit a filing that is in “Draft” status and you must have the Filing Preparer role.
How to Edit a Filing

Plan Details and Filing Details Page

- Click on the “EDIT DRAFT” button.
  - This will only be displayed if you have the Filing Preparer role. Refer to our How to Manage Roles Demo for step-by-step instructions on how to view and edit your plan role(s).

Filing Task History

Filing Details

All screen prepared filings follow this sequential status order:

Create Filing > Draft > Pending Actuary Approval (if required) > Pending Payment Info > Pending Admin Approval > Submitted

Please view the Filing Task History at the bottom of this page to review any actions already taken on this filing.

This premium filing is currently in Draft status. Anyone with the Filing Preparer role for this Plan can select the Edit Draft button (right side) to continue preparing this filing. Filing Coordinators can edit team member roles via the Manage Roles link from the Plan Details page. If you do not want to proceed with this filing, select the Cancel Filing button to remove it from My PAA.

My PAA Filing ID: 419334
PYG: 01/01/2019

Amount Due: $17,920.00
Filing Status: Draft

Date Submitted: / /
How to Edit a Filing

Filing Management Page

- You will be able to navigate through the Comprehensive Premium Filing pages and make any updates and changes, as needed.
How to Edit a Filing

Filing Management Page

- Once you have made the necessary changes to the filing, click the “Submit” button on the Filing Details Review Page.
- Please make sure the accuracy checkbox is checked prior to submission.
After you submit your Comprehensive Premium Filing, you will receive a confirmation that the filing has been successfully submitted to be reviewed, certified and approved.

- Note: The filing will be submitted to the PBGC upon approval and submission by the Plan Admin/Plan Admin Rep.

To continue with the certification and payment process, click on the “Back to Filing Details” button.

- Please refer to the “How to Edit, Review, Certify, Approve and Submit a Filing” demo for further instructions and information.
How to Delete a Filing

Plan Details Page

- Click on the “Filing Details” button for the filing you want to delete.
- Unlike editing a filing, you can delete any in-process filing. This means that if the filing has not already been submitted to PBGC, then you will have the option to delete (cancel) the filing.
Plan Details and Filing Details Page

- Click on the “Cancel Filing” button.
- An on-screen confirmation pop-up will appear.
  - Click the “Confirm Cancellation” button to continue with the deletion.
  - If you have clicked on this action by mistake, click the “Exit” button to return to the previous page.

- Note: The “CANCEL FILING” button will only be displayed if you have the Filing Preparer role. Refer to our How to Manage Roles Demo for step-by-step instructions on how to view and edit your plan role(s).
Once the filing has been deleted, you will automatically be redirected to the Plan Details Page, where you can confirm the deleted filing has been removed from the Premium Filings section.
Home Page

- You can also edit or delete in-process filings by clicking on the “In-Process” icon/link from the Home Page.
In-Process Screen-Prepared Filings

- A list of all non-submitted filings will be listed on the page.
- You may filter by any of the available headers by clicking on the corresponding “up” or “down” arrow.

![In-Process Screen-Prepared Filings](image-url)
As long as you have the appropriate roles, you will be able to “Edit” any screen-prepared filing in draft status and/or “Cancel” any screen-prepared filing that has not been submitted to PBGC.