

# **My Plan Administration Account (My PAA) Import Software-Prepared Filing(s) into My PAA Editing Screens**



# Import Software-Prepared Filing(s) into My PAA Editing Screens

## My PAA Login Page

- Enter your User ID into the field labeled “User ID” on the My PAA login page.
- Enter your Password into the field labeled “Password”.
- Select the button labeled “Login”.

### My PAA Login

Welcome to My Plan Administration Account (My PAA), where you can electronically submit pension plan premium filings and payments to PBGC.

#### What's New and How to Use My PAA

- [What's New for Practitioners](#): Premium filings for plan year 2015 may now be submitted.
- [What's New in My PAA](#)
- [Password Rules](#)
- [More about My PAA](#): e-filing options, payment options, FAQs, Tips, Users Manual, etc.

**User ID:**

**Password:**  (Case Sensitive)

**Login**

[Forgot your User ID?](#)   [Forgot your Password?](#)

[New users click here to sign up.](#)

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# Import Software-Prepared Filing(s) into My PAA Editing Screens

## Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the “Import a Filing” link in the Returning User section.
  - ❖ The Import Software-Prepared Filing(s) Page will be displayed (Slide 5).
- If the Home Page is displayed, go to the slide 4.

Note: The Launch Page is intended to help you initiate the premium related tasks. If you prefer not to see this page when you login, check the “Do not show this page at login” box and select “Close”.

The screenshot shows a modal window titled "My PAA (My Plan Administration Account) Launch Page" overlaid on a background of the PBGC website. The modal contains the following sections:

- Shortcuts:**
  - Review In-Process Filing(s)
  - Create a Filing
  - Import a Filing
  - Upload a Filing
  - Go to Home Page
  - Go to a Plan's Page (e.g., to review an Account History or Submit a Request)
  - Update or Deactivate My PAA Account
- Filing Coordinators:**
  - Add a Plan (indicated by a red arrow)
  - Add a Practitioner
  - Remove a Practitioner
  - Change a Practitioner's Permissions
- Additional Resources:**
  - Helpful Links
  - Demo: Create a Comprehensive filing for Single-employer plan
  - Demo: Create a Comprehensive filing for Multiemployer plan
  - Demo: Review Plans and Correspondence in Your Account
  - Demo: Submit Request, Penalty RFR or Refund

At the bottom of the modal, there is a checkbox labeled "Do not show this page at login" (indicated by a red arrow) and a "Close" button (indicated by a red arrow).

# Import Software-Prepared Filing(s) into My PAA Editing Screens

## From the Home Page

- Select the “Import Filing(s)” button in the Import Software-Prepared Filing(s) section.
- ❖ The Import Software-Prepared Filing(s) Page will be displayed (slide 5).

Note 1: To successfully import a filing, the plan must be in the “Plans in Your Account” section.

Note 2: The Menu Bar on the top of every My PAA screen can be used to easily access other pages, e.g., the Launch Page, and Help information.

The screenshot shows the PBGC My PAA Home Page. At the top, there is a navigation menu with options: LAUNCH PAGE, HOME, PLANS, FILINGS, HELP, DEMOS, My Account, and Logout. The user is logged in as Jack Black. The page is divided into several sections:

- Home Page:** Contains Quick Links (Add Plan, Create Filing, Import Filing, Upload Filing) and a Right Now summary (5 Filings Count (In-Process), 5 You Hold, 0 Others Hold, 5 Plans Count).
- In-Process Filings:** A table listing filings with columns: Filing, Last Routed, Plan Name, EIN/PN, and Held By. The table contains 5 rows of data.
- Plans in Jack Black's Account:** A search bar and a table listing plans with columns: Plan Name, EIN/PN, and Actions. The table contains 5 rows of data.
- Import Software-Prepared Filing(s):** A section with a description and a button labeled "Import Filing(s)" which is highlighted with a red arrow.
- Upload Software-Prepared Filing(s):** A section with a description and a button labeled "Upload Filing(s)".

# Import Software-Prepared Filing(s) into My PAA Editing Screens

## From the Import Software-Prepared Filing(s) Page

- Select The “Browse” link to select the appropriate file to import.
- Select the “Import” button.
- The “Import Software-Prepared Filing Confirmation” page will be displayed (Slide 6).



## Import Software-Prepared Filing(s)

Select the electronic file you created with your private-sector software that contains one or more premium filings to be imported into the My PAA editing screens for routing, editing (if necessary), signature, and submission to PBGC. Please note that if the electronic file includes filing information for the EIN/PN and Plan Year of a filing currently in progress in the My PAA data entry and editing screens, including a filing that has been scheduled for a future submission, that filing will be overwritten with the one from the electronic file.

Note: The file must be in a PBGC-defined XML format.

[What does this mean?](#)

Select File: 2015 SE Filing.xml

Browse...

Cancel

Import

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# Import Software-Prepared Filing(s) into My PAA Editing Screens

## Import Software-Prepared Filing Confirmation Page

- This is the confirmation that the filing(s) have been successfully imported into the My PAA editing screens.
- Review this page and select the “Go to My PAA Home Page” button to view the imported filing (Slide 7).



## Import Software-Prepared Filing

You have successfully imported an electronic file that contains premium filing information for one or more plans in your account. Select the "Go to My PAA Home Page" button. The filing(s) you imported will be listed on that page in your "In-process Filings" section. From there, you can open a filing to edit it (if necessary), route it to another person on your "filing team," or provide the necessary signatures for submission to PBGC.

[Go to My PAA Home Page](#)

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# Import Software-Prepared Filing(s) into My PAA Editing Screens

## Home Page

- The imported filing is displayed in the In-Process Filings section.
- Select the appropriate imported filing in the “Filing” column of the In-Process Filings section to continue the filing process.
- ❖ The “Filing Manager” page will be displayed (Slide 8).
- If necessary, select the “View all In-Process Filings” link to see all of your in-process filings (See Slide 8).

**PBGC My PAA** Welcome, Jack Black!

LAUNCH PAGE HOME PLANS FILINGS HELP DEMOS My Account Logout

Home Page Where's my filing? Print this Page

**Quick Links**

- Add Plan
- Create Filing
- Import Filing
- Upload Filing

**Right Now**

- 4 Filings Count (In-Process)
- 4 You Hold
- 0 Others Hold
- 6 Plans Count

**In-Process Filings** View all In-Process Filings > Instructions

[Clear Sort](#)

Filing	Last Routed	Plan Name	EIN/PN	Held By
2015 Comprehensive		My Retirement Pension Plan	88-8888888 / 750	Jack Black
2015 Comprehensive		Retirement Plan 4	55-6666666 / 777	Jack Black
2015 Comprehensive		Retirement Plan1	11-2222222 / 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-3333333 / 444	Jack Black

**Plans in Jack Black's Account** View all Plans > Instructions

Plan Name / EIN  [Search](#) [Clear Search](#)

Plan Name	EIN/PN	Actions
Pension Plan1	44-1111111 / 444	<a href="#">Create a Filing</a> <a href="#">Invite a Practitioner</a>
Retirement Plan 4	55-6666666 / 777	<a href="#">Create a Filing</a> <a href="#">Invite a Practitioner</a>
Retirement Plan1	11-2222222 / 123	<a href="#">Create a Filing</a> <a href="#">Invite a Practitioner</a>
Retirement Plan2	22-3333333 / 444	<a href="#">Create a Filing</a> <a href="#">Invite a Practitioner</a>
Retirement Plan3	44-5555555 / 777	<a href="#">Create a Filing</a> <a href="#">Invite a Practitioner</a>
Retirement Plan5	88-8888888 / 750	<a href="#">Create a Filing</a> <a href="#">Invite a Practitioner</a>

# Import Software-Prepared Filing(s) into My PAA Editing Screens

## All In-Process Filing(s) Page

- Select the appropriate imported filing in the “Filing” column of the In-Process Filings section.
- ❖ The “Filing Manager” page will be displayed (Slide 9).

Note: You can sort the columns to find a particular filing.



LAUNCH PAGE HOME PLANS ▾ FILINGS ▾ HELP DEMOS My Account Logout

### All In-Process Filing(s) [Instructions](#)

Held By Me  Held By Others  All Filings Clear Sort [Print this page](#)

Filing ▾	Last Routed ▾	Plan Name ▾	EIN/PN ▾	Held By ▾
2015 Comprehensive		My Retirement Pension Plan	88-8888888/ 750	Jack Black
2015 Comprehensive		Retirement Plan 4	55-6666666/ 777	Jack Black
2015 Comprehensive		Retirement Plan1	11-2222222/ 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-3333333/ 444	Jack Black



# Import Software-Prepared Filing(s) into My PAA Editing Screens

## Filing Manager Page

- Use the Filing Manager page to review, edit, sign, pay, attach a supplement PDF file and submit the filing. See the demo “Review, Edit, Sign, and Route a filing”.
- Select the appropriate link/button to logout of My PAA or go to another page (e.g., the Plan Page).

**LAUNCH PAGE** HOME PLANS ▾ FILINGS ▾ HELP DEMOS My Account Log out

**Step 2: Edit Draft, Sign Filing, and Select Payment Alternative** [View Account History](#)

**Retirement Plan 4 – 55-6666666 / 777**

1 Start a Draft Filing → 2 Edit Draft, Sign Filing, and Select Payment Alternative → 3 Submit Filing with Payment (if any) → 4 Receive Filing Confirmation

**Filing Manager** [Go to Plan Page](#)

**Filing Status**

Filing is:  ready for submission (refer to 'To submit this filing' below)

[Submit Now](#) [Submit Later](#)

Note: Click the "submit now" button only once or you may encounter an error.

**Filing Task List** [Instructions](#)

<a href="#">View/Edit Filing</a>	✓ This filing has the required information but will undergo additional validations upon submission. Please click the <a href="#">View Filing</a> button to review the warnings that are displayed and the accuracy of the data before the filing is submitted.	<a href="#">Delete Filing</a>
	✓ Plan Administrator or PA Representative e-signature completed 11:12 AM, 12/3/2018 Eastern Time	<a href="#">Remove Signature</a>
	✓ Enrolled Actuary e-signature completed 11:12 AM, 12/3/2018 Eastern Time	<a href="#">Remove Signature</a>
<a href="#">Edit E-Payment</a>	✓ Authorization for payment alternative completed Payment alternative selected: Paper Check 11:12 AM, 12/3/2018 Eastern Time	
<a href="#">Attach File</a>		

**To take action on this filing:**

- You must be holding the filing (otherwise, only 'View Filing' is available). Tasks listed reflect your permissions for this plan. Permissions are listed in the Filing Team section below.
- Note: If a change is made that affects the amount due or variable-rate premium information, any signatures/authorizations will be removed. The filing will need to be re-signed/authorized.

**To submit this filing**

- You must be holding the filing and must have the Plan Administrator, PA Representative or Filing Coordinator permission.
- The Filing Status must show that the filing is ready for submission.
- Each required signature/authorization on the task list must be completed.
- Review all warnings and the accuracy of the data before submission.
- Click a "Submit" button.