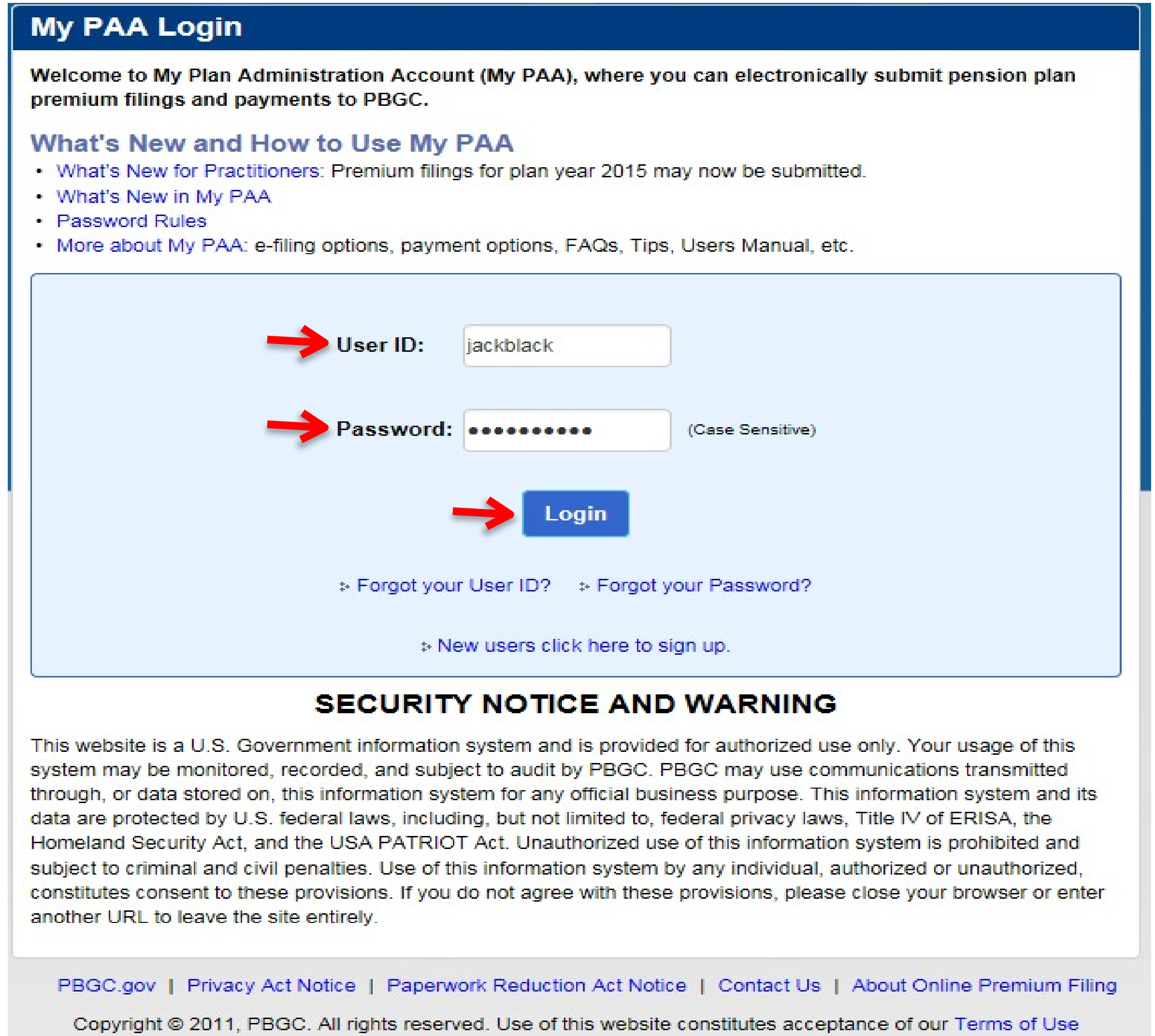
My Plan Administration Account (My PAA) Import Software-Prepared Filing(s) into My PAA Editing Screens

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“.

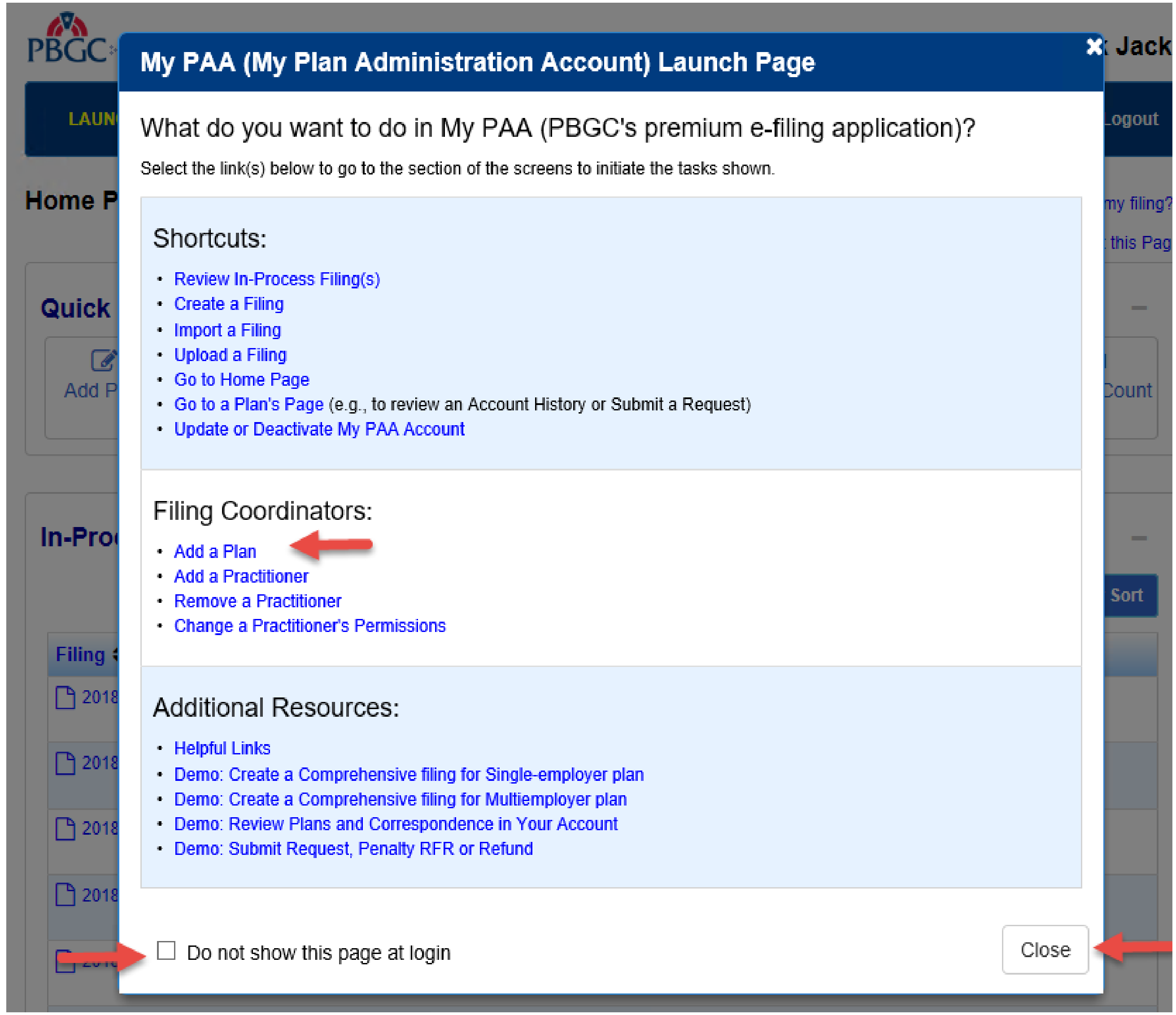


Import Software-Prepared Filing(s) into My PAA Editing Screens

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”.



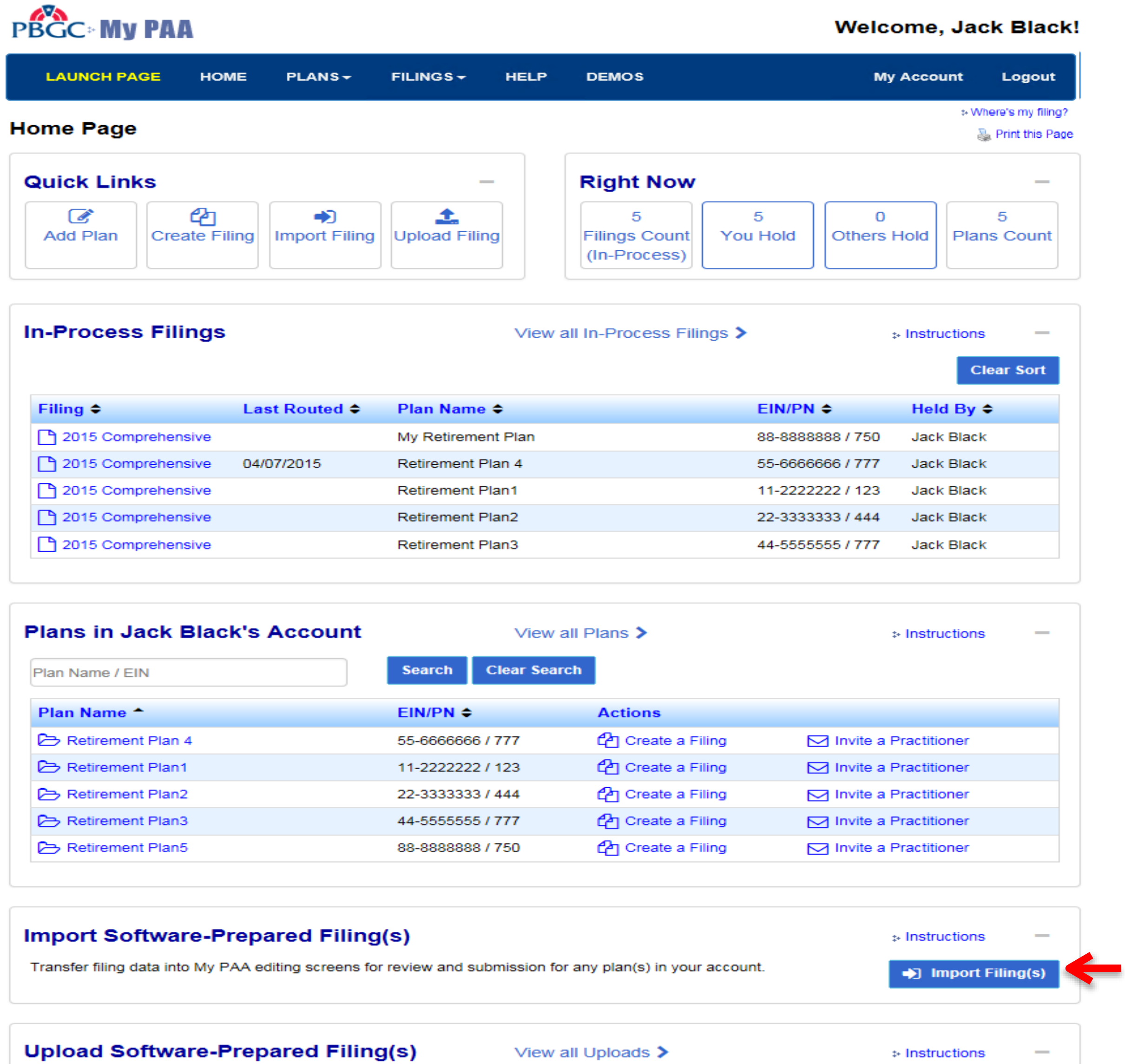
Import Software-Prepared Filing(s) into My PAA Editing Screens

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.

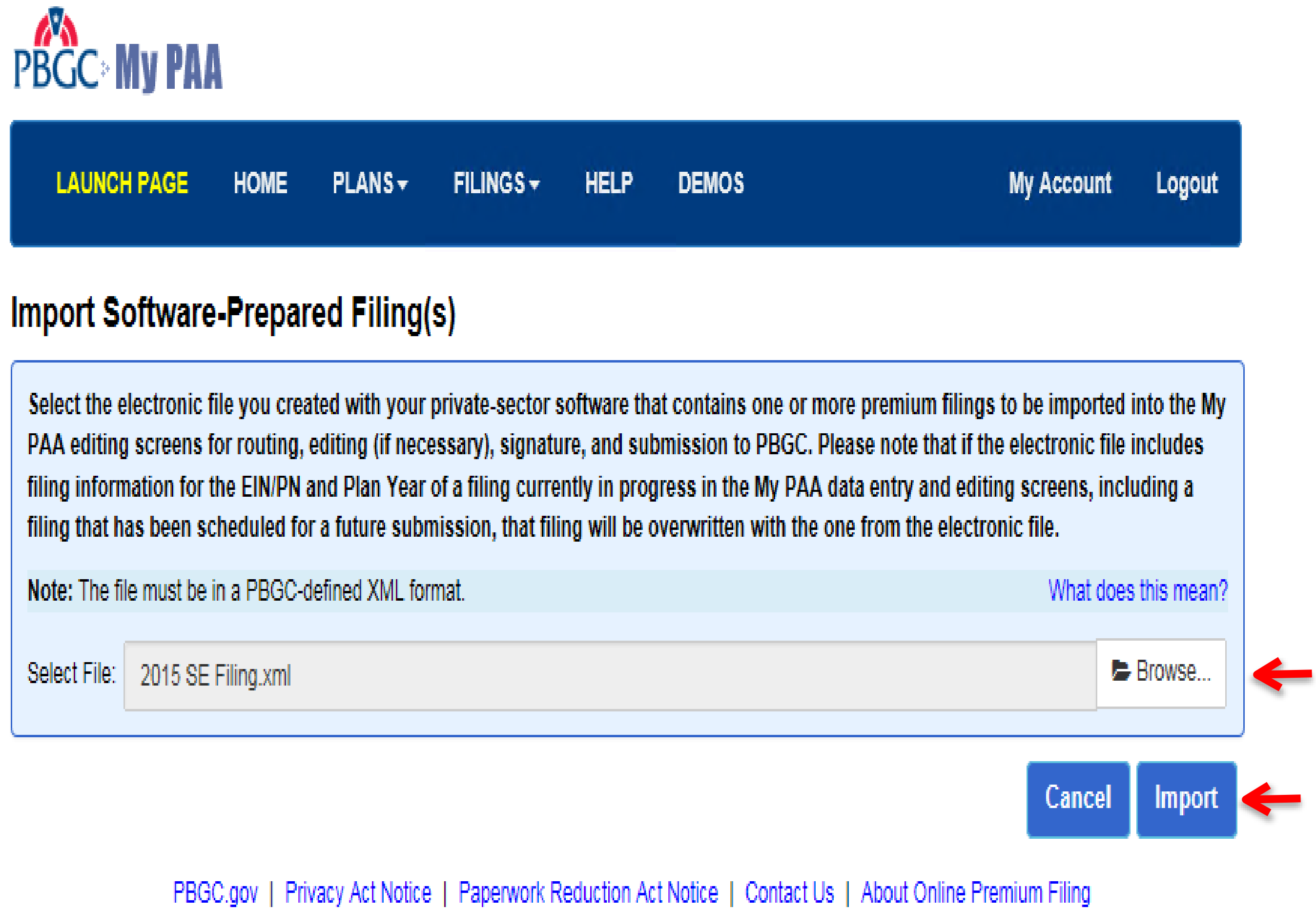
Note 2: The Menu Bar on the top of every My PAA screen can be used to easily access other pages, e.g., the Launch Page, and Help information.



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

From the Import Software-Prepared Filing(s) Page

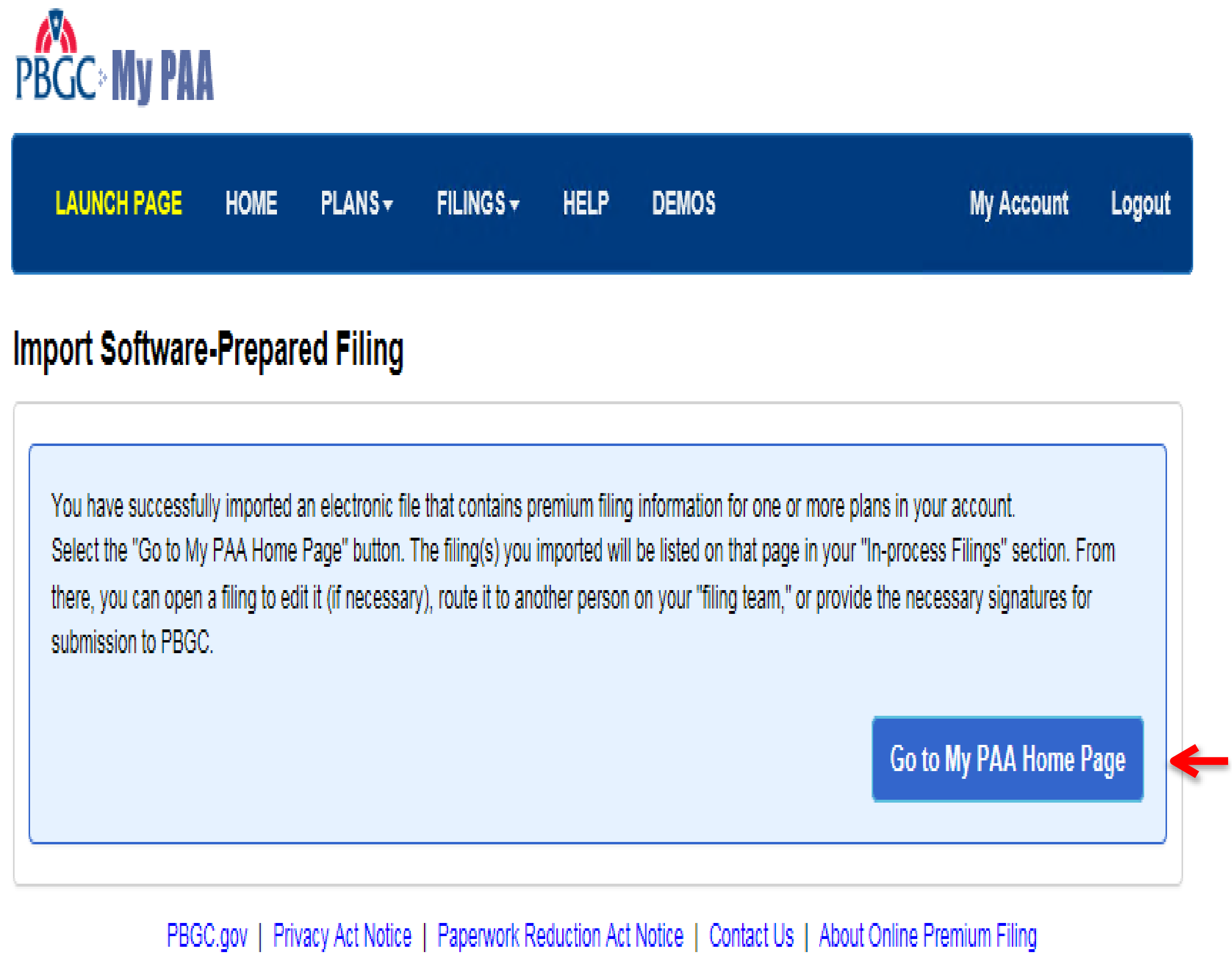
- Select The “Browse” link to select the appropriate file to import.
- Select the “Import” button.
- The “Import Software-Prepared Filing Confirmation” page will be displayed (Slide 6).



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

Import Software-Prepared Filing Confirmation Page

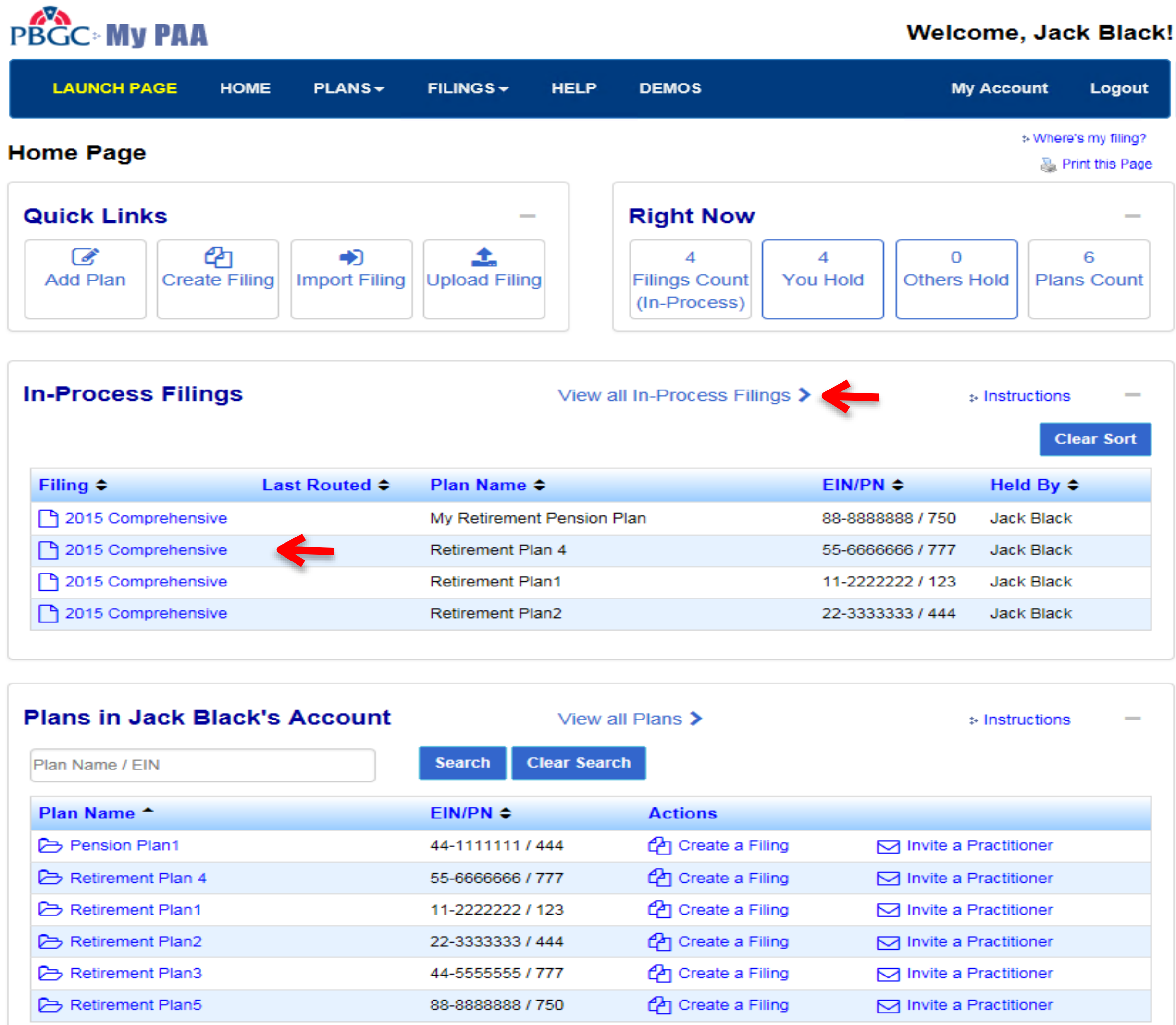
- This is the confirmation that the filing(s) have been successfully imported into the My PAA editing screens.
- Review this page and select the “Go to My PAA Home Page” button to view the imported filing (Slide 7).



Import Software-Prepared Filing(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).



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.

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).