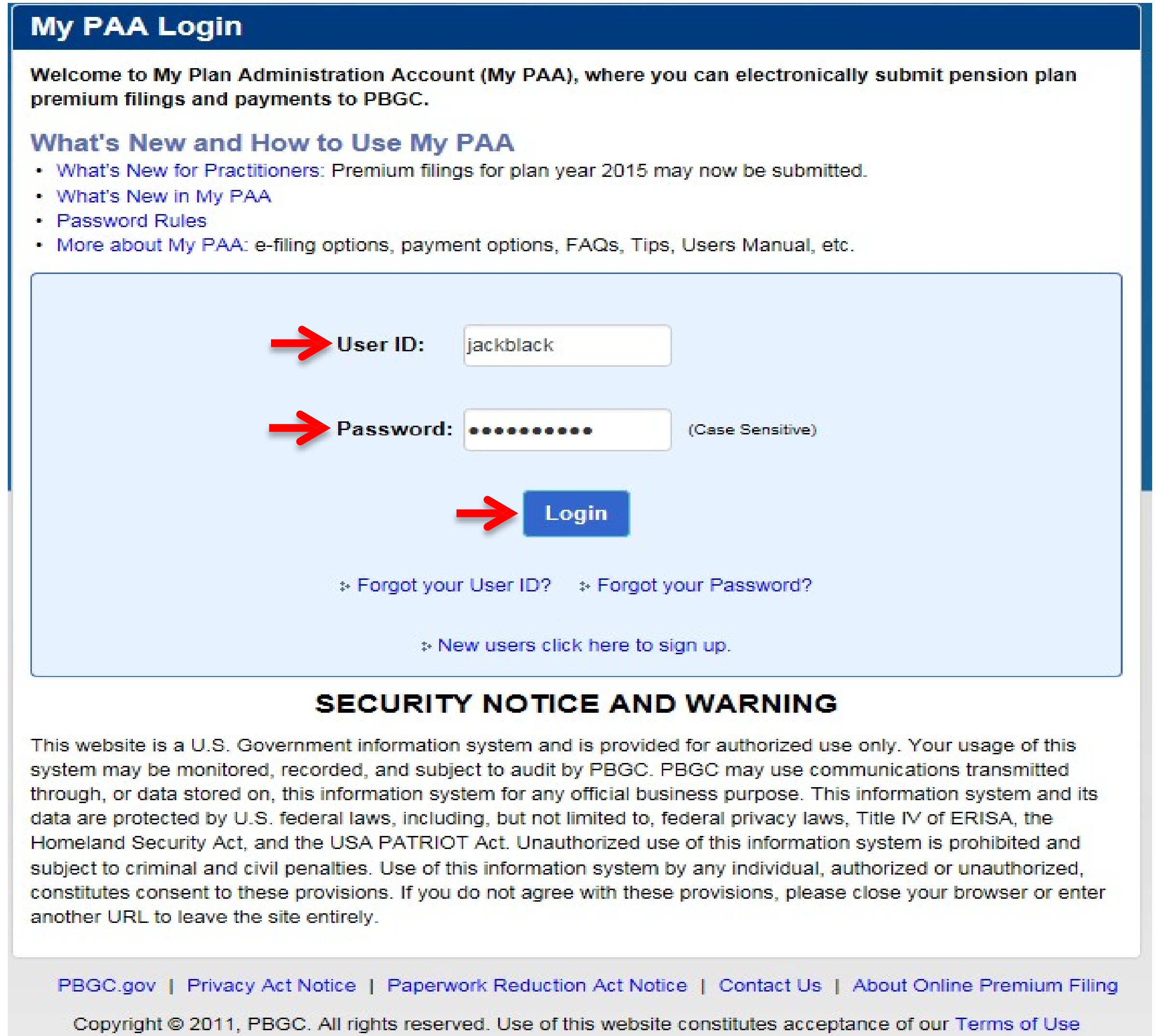
My Plan Administration Account (My PAA) Filing Coordinator: Add a Plan

Filing Coordinator Activity - Add a Plan

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".

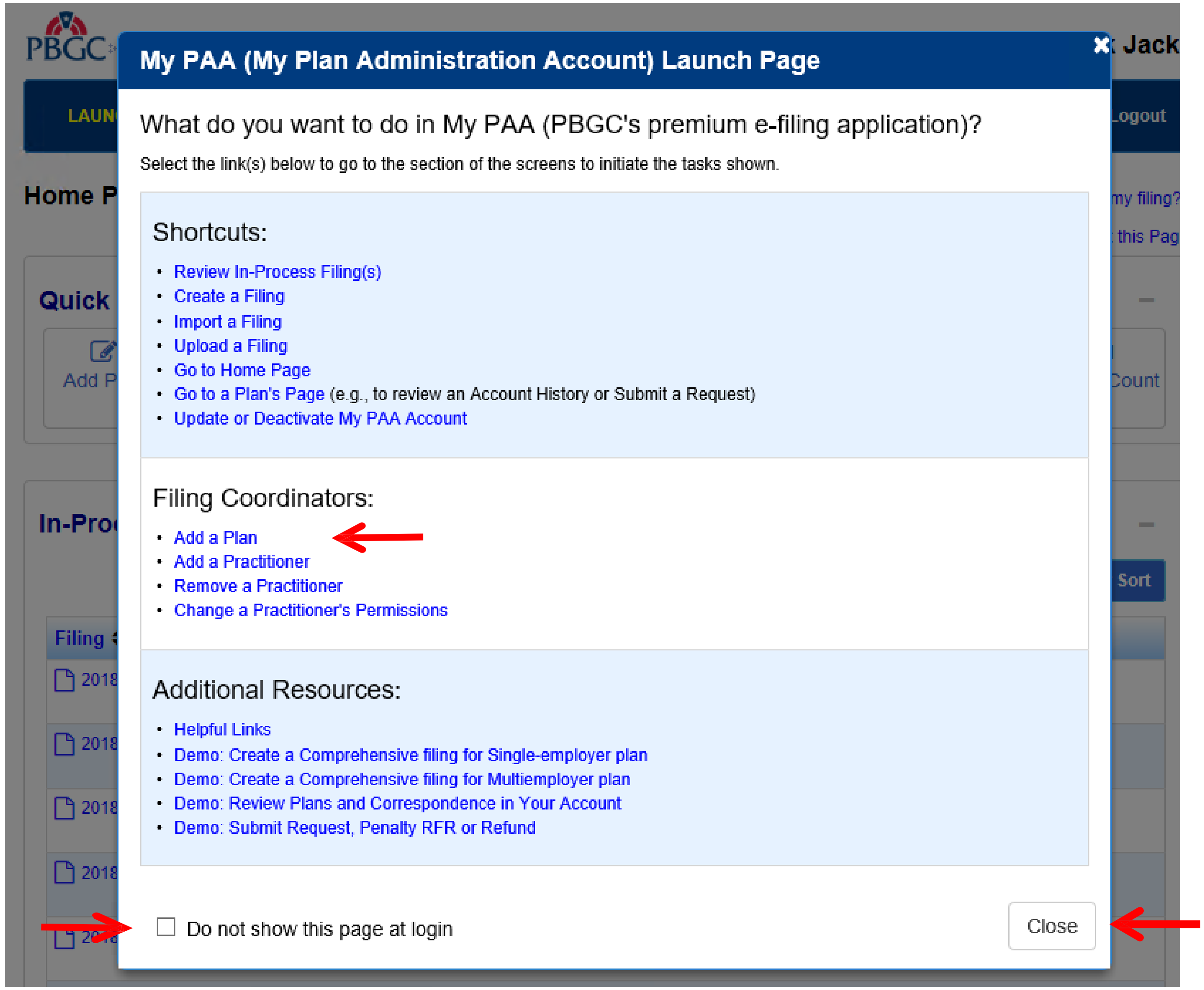


Filing Coordinator Activity - Add a Plan

From the Launch Page

- ➢ You are now logged into My PAA.
- ➢ If the Launch Page overlaid on top of your Home Page is displayed, select the “Add a Plan” link in the Filing Coordinators section.
    - ❖ The “Add a Plan as Filing Coordinator confirmation” Page will be displayed (Slide 3).
- ➢ If the Home Page is displayed, go to 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”.

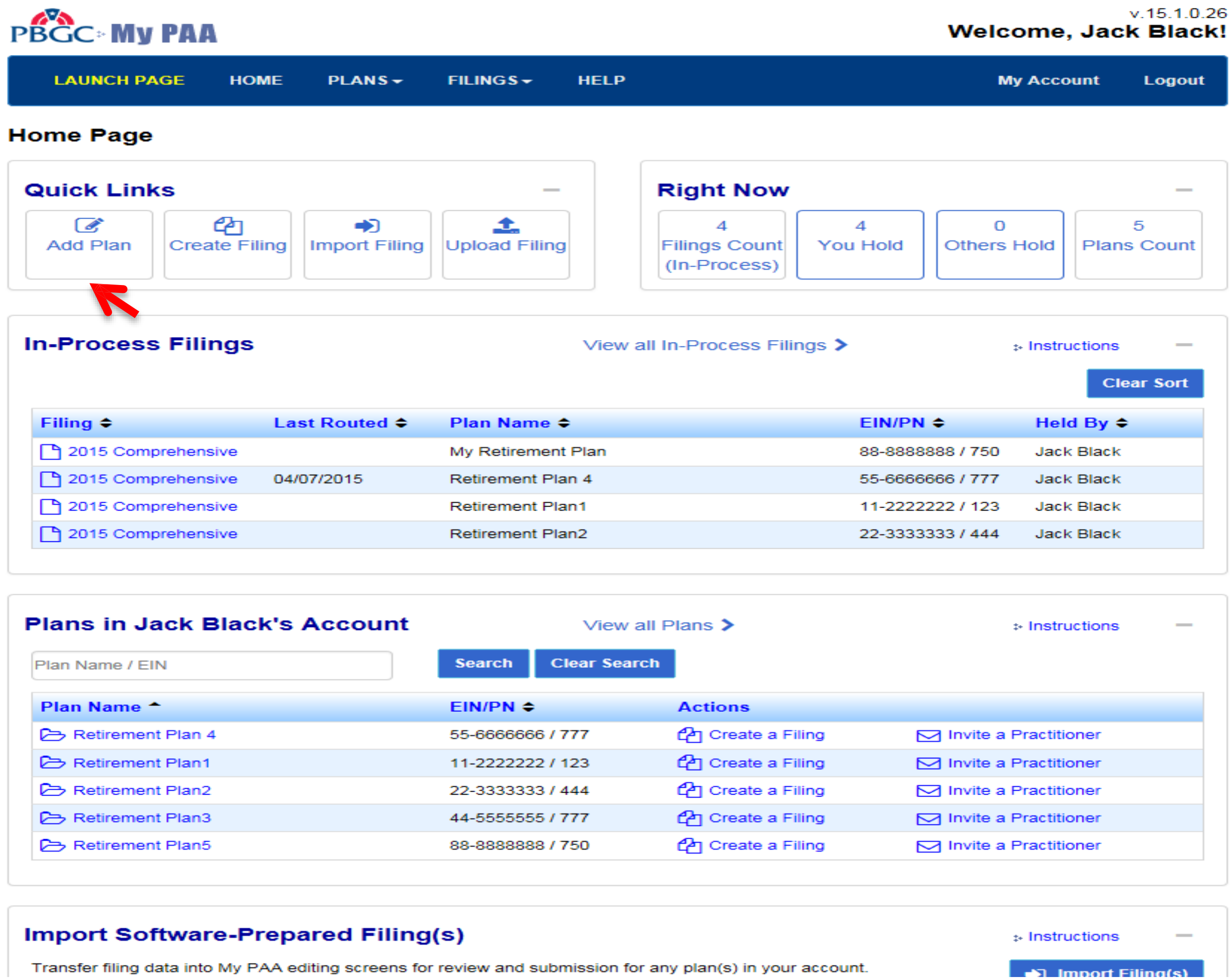


Filing Coordinator Activity - Add a Plan

From the Home Page

- Select the “Add Plan” link from the Quick Links Panel.
  - The “Add a Plan as Filing Coordinator Confirmation” page will be displayed (slide 3).

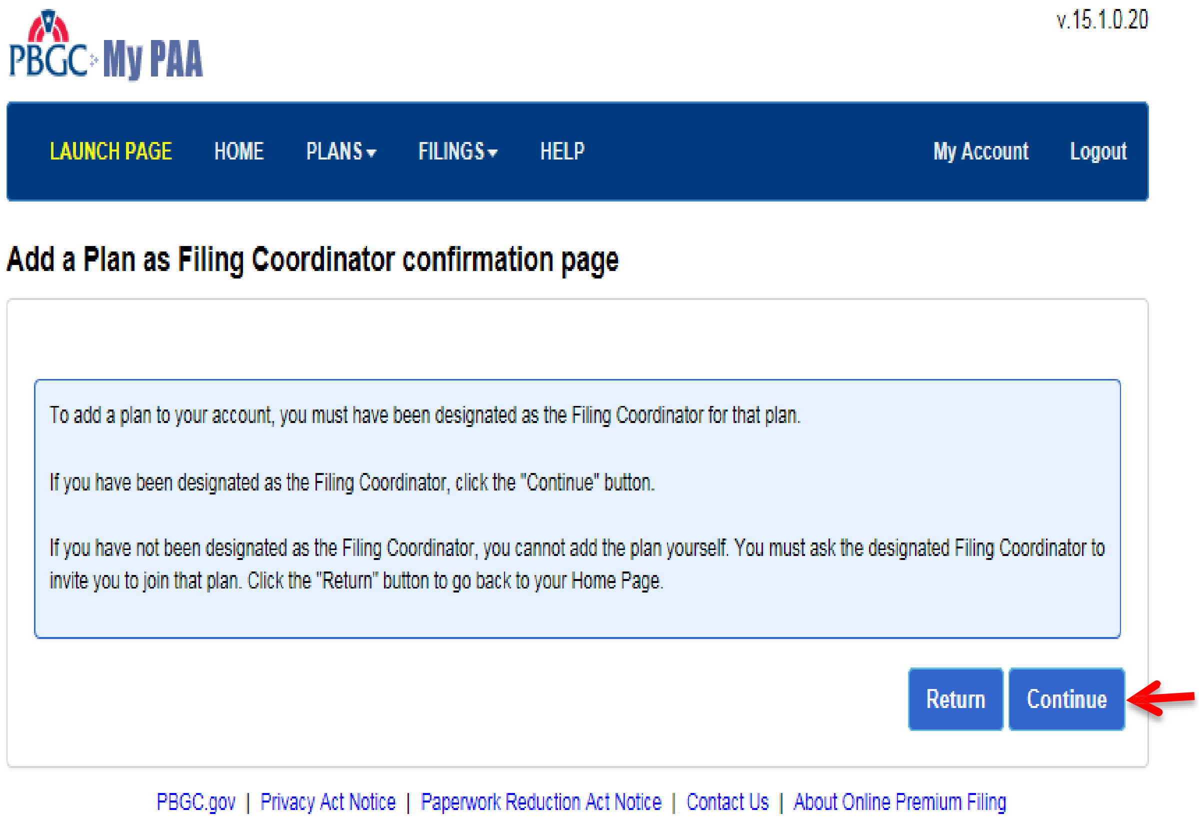
Note: The Menu Bar on the top of every My PAA screen can be used to easily access other pages, e.g., the Launch Page, and Help information.



Filing Coordinator Activity - Add a Plan

From the Add a Plan As Filing Coordinator Confirmation Page

- This page informs you that you must be designated as the Filing Coordinator for this plan in order to add the plan to your My PAA account.
  - Select the “Continue” button.
  - The “Add a Plan Page” will be displayed (Slide 5).

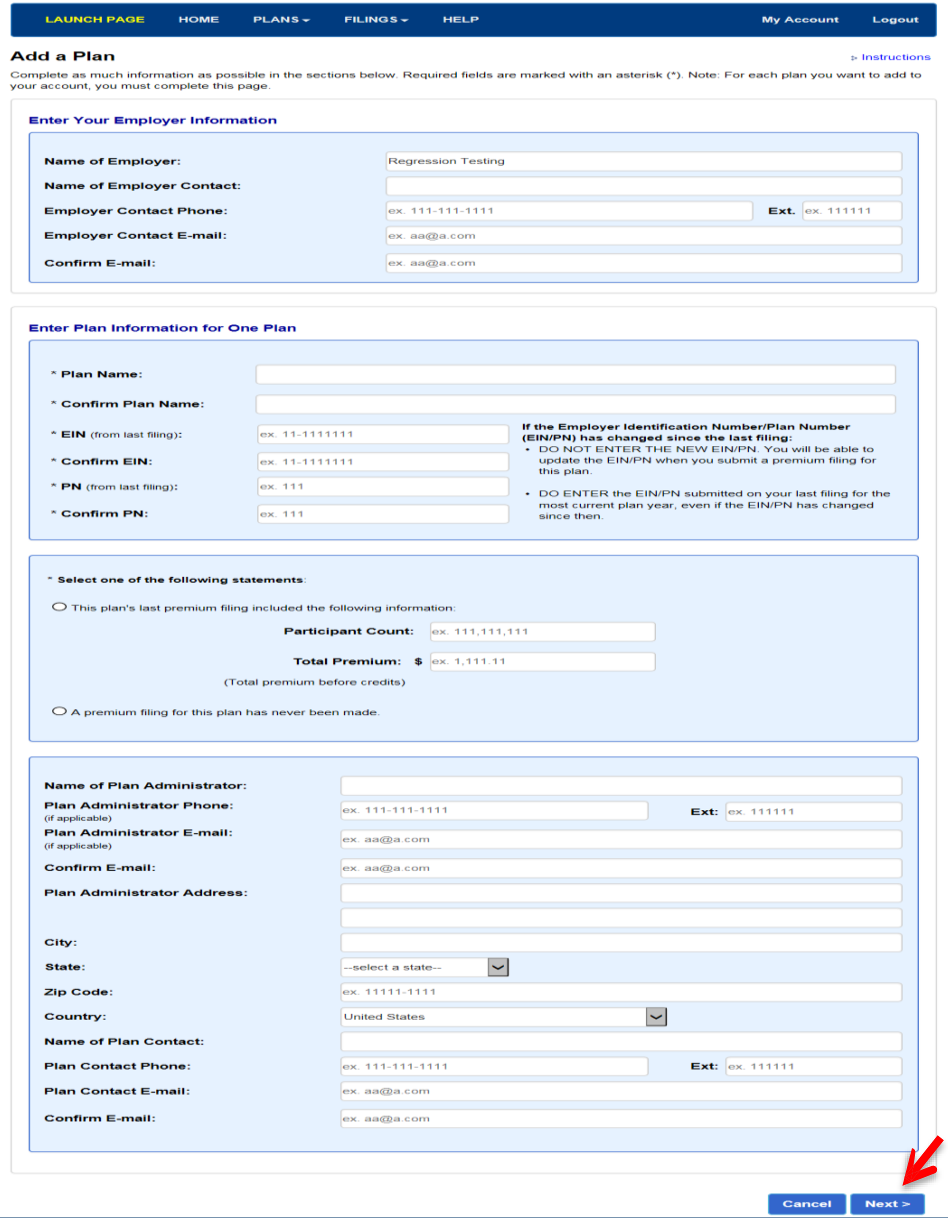


Filing Coordinator Activity - Add a Plan

Add a Plan Page

- ➢ Enter the requested information (e.g., your employer and the plan Information).
- ➢ Select the “Next” button.

Note: the **“*”** next to a field means that field is required for input.



LAUNCH PAGE HOME PLANS ▾ FILINGS ▾ HELP My Account Logout

Add a Plan

▹ Instructions

Complete as much information as possible in the sections below. Required fields are marked with an asterisk (*). Note: For each plan you want to add to your account, you must complete this page.

Enter Your Employer Information

Name of Employer: Regression Testing
Name of Employer Contact:
Employer Contact Phone: ex. 111-111-1111 Ext. ex. 111111
Employer Contact E-mail: ex. aa@a.com
Confirm E-mail: ex. aa@a.com

Enter Plan Information for One Plan

* Plan Name:
* Confirm Plan Name:
* EIN (from last filing): ex. 11-1111111
* Confirm EIN: ex. 11-1111111
* PN (from last filing): ex. 111
* Confirm PN: ex. 111

If the Employer Identification Number/Plan Number (EIN/PN) has changed since the last filing:
- DO NOT ENTER THE NEW EIN/PN. You will be able to update the EIN/PN when you submit a premium filing for this plan.
- DO ENTER the EIN/PN submitted on your last filing for the most current plan year, even if the EIN/PN has changed since then.

* Select one of the following statements:

○ This plan's last premium filing included the following information:
Participant Count: ex. 111,111,111
Total Premium: $ ex. 1,111.11
(Total premium before credits)

○ A premium filing for this plan has never been made.

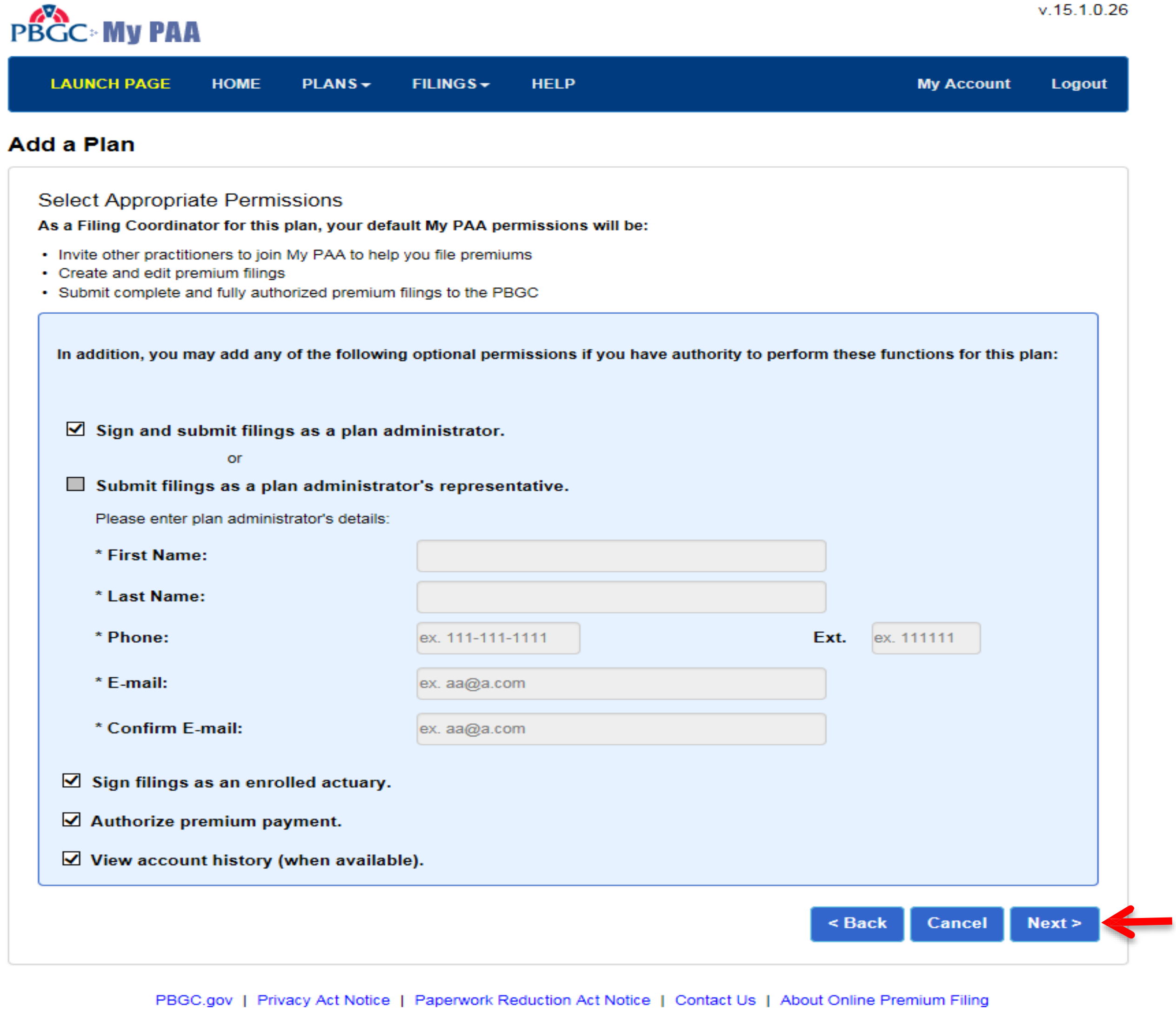
Name of Plan Administrator:
Plan Administrator Phone: (if applicable) ex. 111-111-1111 Ext: ex. 111111
Plan Administrator E-mail: (if applicable) ex. aa@a.com
Confirm E-mail: ex. aa@a.com
Plan Administrator Address:
City:
State: --select a state--
Zip Code: ex. 11111-1111
Country: United States
Name of Plan Contact:
Plan Contact Phone: ex. 111-111-1111 Ext: ex. 111111
Plan Contact E-mail: ex. aa@a.com
Confirm E-mail: ex. aa@a.com

Cancel Next >

Filing Coordinator Activity - Add a Plan

Add a Plan Page

- You also select any additional permissions for yourself that are appropriate for the plan by selecting the checkbox next to each permission.
- Select the “Next” button.



PBGC My PAA

v.15.1.0.26

LAUNCH PAGE | HOME | PLANS | FILINGS | HELP | My Account | Logout

Add a Plan

Select Appropriate Permissions

As a Filing Coordinator for this plan, your default My PAA permissions will be:

- Invite other practitioners to join My PAA to help you file premiums
- Create and edit premium filings
- Submit complete and fully authorized premium filings to the PBGC

In addition, you may add any of the following optional permissions if you have authority to perform these functions for this plan:

☑ **Sign and submit filings as a plan administrator.**

or

☐ **Submit filings as a plan administrator's representative.**

Please enter plan administrator's details:

*** First Name:**

*** Last Name:**

*** Phone:** ex. 111-111-1111 **Ext.** ex. 111111

*** E-mail:** ex. aa@a.com

*** Confirm E-mail:** ex. aa@a.com

☑ **Sign filings as an enrolled actuary.**

☑ **Authorize premium payment.**

☑ **View account history (when available).**

< Back | Cancel | Next >

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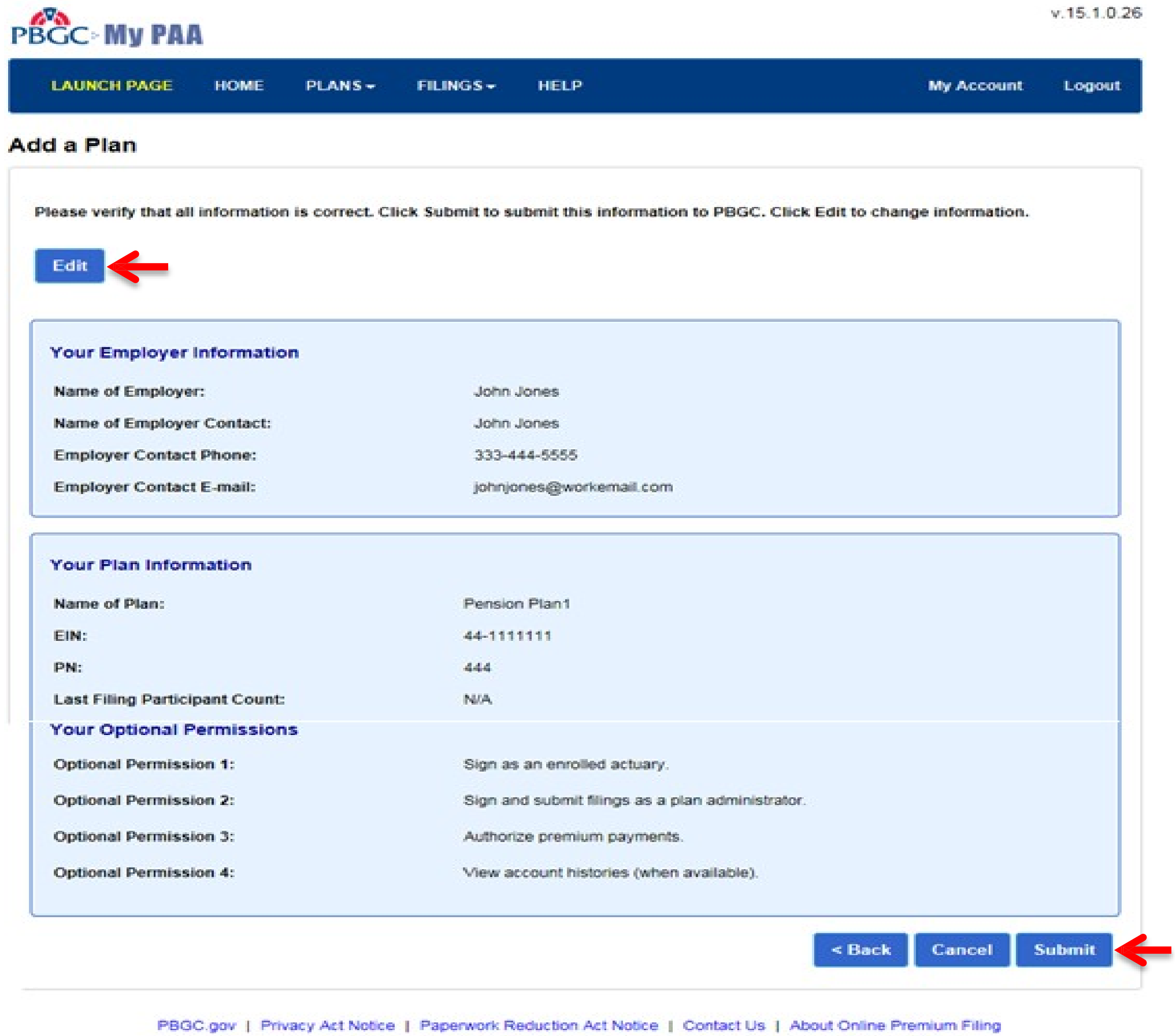
Filing Coordinator Activity - Add a Plan

Add a Plan Page

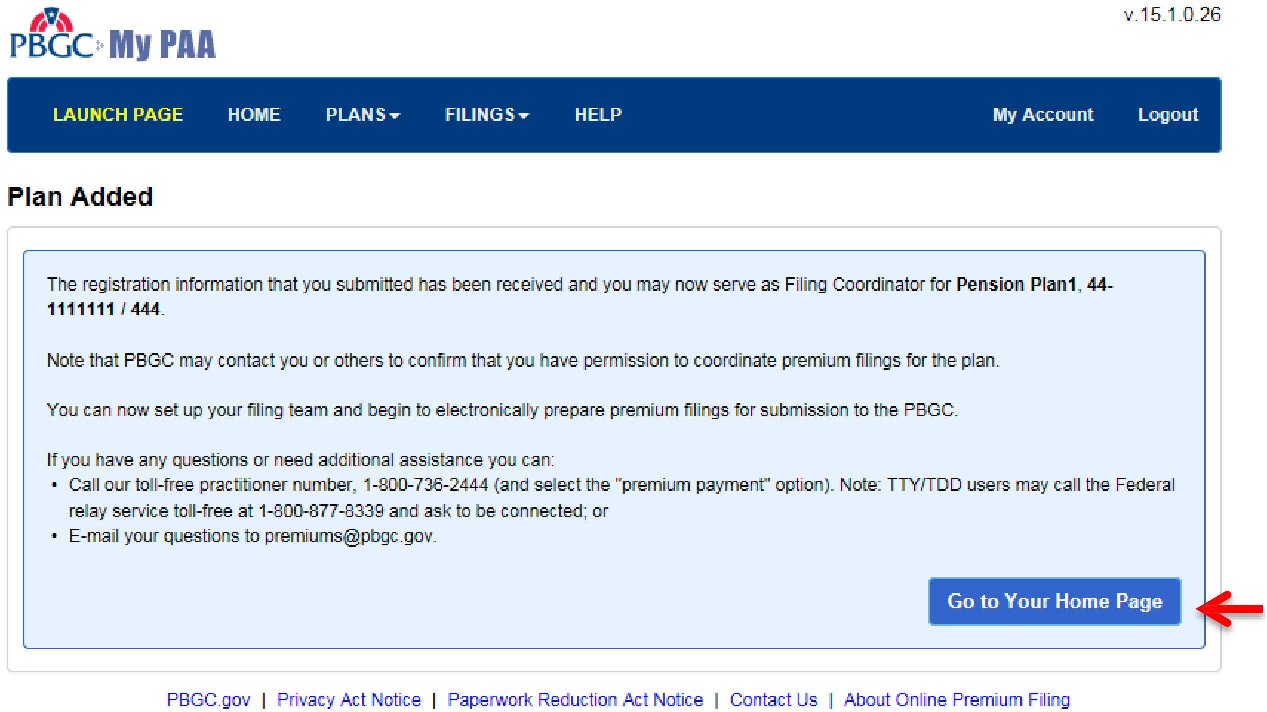
- All of the information you entered is displayed for your review.
  - If any information needs to be modified, select the “Edit” button.
  - Otherwise, select the “Submit” button to add the plan to your account.



Filing Coordinator Activity - Add a Plan

Plan Added Page

- This page confirms the addition of the plan to your My PAA account and notes that you may be contacted by PBGC to confirm your role for this plan.
- Select the “Go to Your Home Page” button to review the newly-added plan (Slide 9).



Filing Coordinator Activity - Add a Plan

Home Page

- In the "Plans In Your Account" section, the plan you just added is listed and you can perform the following actions:
  - Select the "Plan Name" link in the Plan Name Column to go to the Plan Page of that plan.
  - Select the "Create a Filing" link in the Actions Heading to create a filing for that plan.
  - As the Filing Coordinator, select the "Invite a Practitioner" link to invite a practitioner for that plan.

Note: You can import software-prepared filings for any plans in your account. Also, you can upload software-prepared filings for any plans (including plans that are not in your account), if you have at least one plan in your account.

- Select the appropriate link/button to logout of My PAA or go to another page (e.g., the Launch Page).