

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



Pension Benefit Guaranty Corporation  
Protecting America's Pensions

# 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”.

### 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)

➔

➔

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

➔

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

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# 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 5).
- 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”.

**My PAA (My Plan Administration Account) Launch Page**

What do you want to do in My PAA (PBGC's premium e-filing application)?

Select the link(s) below to go to the section of the screens to initiate the tasks shown.

**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
- 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

☐ Do not show this page at login

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 5).

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.

**PBGC My PAA** v. 15.1.0.26  
Welcome, Jack Black!

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

**Home Page**

**Quick Links**

[Add Plan](#)

[Create Filing](#)

[Import Filing](#)

[Upload Filing](#)

**Right Now**

4 Filings Count (In-Process)

4 You Hold

0 Others Hold

5 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 Plan	88-888888 / 750	Jack Black
2015 Comprehensive	04/07/2015	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](#)

[Search](#) [Clear Search](#)

Plan Name	EIN/PN	Actions
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)** [Instructions](#)

Transfer filing data into My PAA editing screens for review and submission for any plan(s) in your account.

[Import Filing\(s\)](#)

# 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 6).



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## Add a Plan as Filing Coordinator confirmation page

To add a plan to your account, you must have been designated as the Filing Coordinator for that plan.

If you have been designated as the Filing Coordinator, click the "Continue" button.

If you have not been designated as the Filing Coordinator, you cannot add the plan yourself. You must ask the designated Filing Coordinator to invite you to join that plan. Click the "Return" button to go back to your Home Page.

[Return](#)

[Continue](#)

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# 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.

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[» Instructions](#)

### Add a Plan

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	<b>If the Employer Identification Number/Plan Number (EIN/PN) has changed since the last filing:</b> <ul style="list-style-type: none"><li>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.</li><li>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.</li></ul>	
* Confirm EIN:	ex. 11-1111111		
* PN (from last filing):	ex. 111		
* Confirm PN:	ex. 111		
* Select one of the following statements:			
<input type="radio"/> 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)			
<input type="radio"/> A premium filing for this plan has never been made.			

Name of Plan Administrator:			
Plan Administrator Phone:	ex. 111-111-1111	Ext.	ex. 111111
Plan Administrator E-mail:	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 >](#)

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# 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.



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### 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).

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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.

### Add a Plan

Please verify that all information is correct. Click Submit to submit this information to PBGC. Click Edit to change information.

Edit



#### Your Employer Information

Name of Employer:	John Jones
Name of Employer Contact:	John Jones
Employer Contact Phone:	333-444-5555
Employer Contact E-mail:	johnjones@workemail.com

#### Your Plan Information

Name of Plan:	Pension Plan1
EIN:	44-1111111
PN:	444
Last Filing Participant Count:	N/A

#### Your Optional Permissions

Optional Permission 1:	Sign as an enrolled actuary.
Optional Permission 2:	Sign and submit filings as a plan administrator.
Optional Permission 3:	Authorize premium payments.
Optional Permission 4:	View account histories (when available).

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Cancel

Submit





# 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 10).



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### Plan Added

The registration information that you submitted has been received and you may now serve as Filing Coordinator for **Pension Plan1, 44-1111111 / 444**.

Note that PBGC may contact you or others to confirm that you have permission to coordinate premium filings for the plan.

You can now set up your filing team and begin to electronically prepare premium filings for submission to the PBGC.

If you have any questions or need additional assistance you can:

- Call our toll-free practitioner number, 1-800-736-2444 (and select the “premium payment” option). Note: TTY/TDD users may call the Federal relay service toll-free at 1-800-877-8339 and ask to be connected; or
- E-mail your questions to [premiums@pbgc.gov](mailto:premiums@pbgc.gov).

[Go to Your Home Page](#)

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# 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).

### Home 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 Plan	88-888888 / 750	Jack Black
2015 Comprehensive	04/07/2015	Retirement Plan 4	55-666666 / 777	Jack Black
2015 Comprehensive		Retirement Plan1	11-222222 / 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-333333 / 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	44-111111 / 444	<a href="#">Create a Filing</a> <a href="#">Invite a Practitioner</a>
Retirement Plan 4	55-666666 / 777	<a href="#">Create a Filing</a> <a href="#">Invite a Practitioner</a>

**Import Software-Prepared Filing(s)**[Instructions](#)

Transfer filing data into My PAA editing screens for review and submission for any plan(s) in your account.

[Import Filing\(s\)](#)

**Upload Software-Prepared Filing(s)**[View all Uploads >](#)[Instructions](#)

Submit fully-completed filing(s) for any plan(s) once you have at least one plan in your account. After the file is uploaded, click the link (if shown) under “Conf. ID/ Receipt” to view the receipt(s) showing data submitted for each filing. View this section's Instructions for details.

[Upload Filing\(s\)](#)

File Name	Comments	Conf. ID/Receipt	Received	Filing Status	Payment Status
2015 SE Filing-2.xml	Yes	3743951	4/7/2015 10:30:20 AM	Completed	Not Applicable