

My Plan Administration Account (My PAA) Review Account History for a Plan (Active Plans vs. Archived Plans)



Review Account History for a Plan (Active Plans vs. Archived Plans)

My PAA Login Page

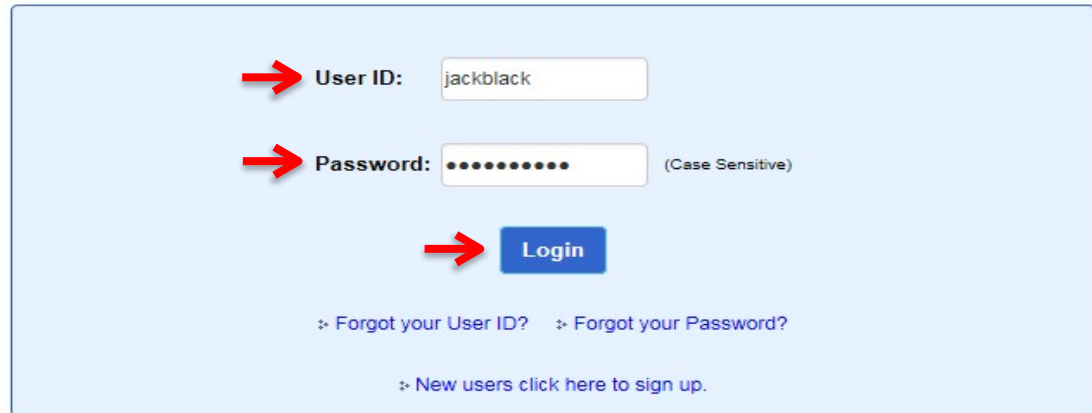
- Enter your User ID into the field labeled “User ID” on the My PAA login page.
- Enter your Password into the field labeled “Password”.
- Select the button labeled “Login”.

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.



The screenshot shows the My PAA Login page. It features a light blue background. At the top, there is a dark blue header with the text "My PAA Login". Below the header, there is a welcome message. Underneath, there is a section titled "What's New and How to Use My PAA" with a list of links. The main content area is a white box with a light blue border. Inside this box, there are three input fields: "User ID:" with the text "jackblack", "Password:" with a masked password "....." and the text "(Case Sensitive)", and a blue "Login" button. Red arrows point to each of these three elements. Below the input fields, there are two links: "Forgot your User ID?" and "Forgot your Password?". At the bottom of the box, there is a link: "New users click here to sign up."

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Review Account History for a Plan (Active Plans vs. Archived Plans)

Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the “Go to a Plan’s Page” link in the Returning User section.
 - ❖ The “All Plans in your Account” 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”.

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

Review Account History for a Plan (Active Plans vs. Archived Plans)

From the Home Page

- Select the appropriate plan name in the “Plan Name” column in the Plans in your Account section.
 - ❖ The “Plan Page” will be displayed (Slide 6).
- If necessary, select the “View all Plans” link to see all of your Plans (Slide 5).

Home Page Where's my filing?
 Print this Page

Quick Links

Add Plan

Create Filing

Import Filing

Upload Filing

Right Now

1
Filings Count
(In-Process)

1
You Hold

0
Others Hold

8
Plans Count

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

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

Search
Clear Search

Plan Name ^	EIN/PN ⇅	Actions
Retirement Plan 1	10-4104104 / 001	Create a Filing Invite a Practitioner
Retirement Plan 2	44-4555222 / 001	Create a Filing Invite a Practitioner
Retirement Plan 3	44-4777888 / 001	Create a Filing Invite a Practitioner
Retirement Plan 4	55-8666666 / 777	Create a Filing Invite a Practitioner

Import Software-Prepared Filing(s) Instructions +

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.#/Receipt" to view the receipt(s) showing data submitted for each filing. View this section's Instructions for details.

File Name	Comments	Conf #/Receipt	Received	Filing Status	Payment Status
2015 SE Filing-2.xml	Yes	3743951	4/7/2015 10:30:20 AM	Completed	Not Applicable
2015 SE Filing-2.xml	Yes	3743949	4/7/2015 10:28:19 AM	Completed	Incomplete
2015 SE Filing-2.xml	Yes	3743947	4/7/2015 10:23:52 AM	Completed	Incomplete

Note 1: You can search and sort the columns to find a particular plan.

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.

Review Account History for a Plan (Active Plans vs. Archived Plans)

From the All Plans in Your Account Page

- Select the appropriate plan in the “Plan Name” column.
- The “Plan Page” will be displayed (Slide 6).
- Plans are typically displayed in the Active Plans section.
- You have the option to move a plan to the Archived Plans section (e.g., if the plan is rarely used) by checking the box for the plan and clicking the “Move to Archived Plans” button.
- To return the plan to the Active Plans section, check the box for the plan and click the “Move to Active Plans” button.

Note: You can search and sort the columns to find a particular plan within both Active and Archived Plans section.



All Plans in Jack Black's Account

[Instructions](#)

[Print this page](#)

Active Plans

Plan Name / EIN

Plan Name ^	EIN/PN v	Actions	View Account History
<input type="checkbox"/> Retirement Plan 1	10-4104104 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 2	44-4555222 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 3	44-4777888 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 4	55-6666666 / 777	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>

Archived Plans

Plan Name / EIN

Plan Name ^	EIN/PN v	Actions	View Account History
<input type="checkbox"/> Retirement Plan 5	10-2102102 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 6	65-0425084 / 002	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 7	10-3103103 / 001	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>
<input type="checkbox"/> Retirement Plan 8	74-2980802 / 231	<input type="button" value="Create a Filing"/>	<input type="button" value="Account History"/> <input type="checkbox"/>

Review Account History for a Plan (Active Plans vs. Archived Plans)

Plan Page

- Select the “Account History” link to continue to the Account History.
- Select the “About Account Histories” link to learn about the data on the Account Histories.

Note 1: You must have been given the “permission” to view the plan’s Account History. If you do not see the Account History link, ask the plan’s filing coordinator to add the “View Account History” permission to your account.

Note 2: If the plan is trustee, the Account History will not be displayed as described in the Account History section.

The screenshot shows the PBGC My PAA Plan Page. The top navigation bar includes links for LAUNCH PAGE, HOME, PLANS, FILINGS, HELP, DEMOS, My Account, and Logout. The main content area is titled "Plan Page" and includes a "Quick Links" section with buttons for Premium Filings, Plan Practitioners, Plan Correspondence, and Submit a Request. Below this is the "Plan Information" section for "Retirement Plan 4 - 55-6666666 / 777", showing fields for Plan Sponsor, Plan Administrator, and Plan Contact. A note below states that the information is the most up-to-date available and provides contact information for updates. To the right is the "Account History" section, titled "Premium Filings and Payments Received by PBGC". It contains a link for "Account History" (highlighted with a red arrow) and a link for "About Account Histories" (also highlighted with a red arrow). Below the Account History section is the "Premium Filings for the Plan (Screen-Prepared and Imported Only)" section, which includes a table of filings. The table has columns for Filing, Confirmation #, Filing Method, Received Date, and Status. Two filings are listed: a 2017 Comprehensive filing (Confirmation # 4080091, Status: Submitted/Successfully Processed) and a 2016 Comprehensive filing (Confirmation # 4080090, Status: Submitted/Filing Errors). Below the filings is the "Premium Filing Practitioners for the Plan" section, which includes a table of practitioners. The table has columns for Edit, Name, Permissions, Phone, Email, and Remove Practitioner. Three practitioners are listed: Sue Practitioner (Plan Administrator, Paying Agent, Preparer), Jonny Doe (Preparer, Paying Agent), and Jack Black (Actuary, View Account History, Filing Coordinator, Paying Agent, Plan Administrator, Preparer).

Review Account History for a Plan (Active Plans vs. Archived Plans)

Account History Information Page

- Review the instructions on this page.
- Select the “Continue” button to display the Account History.
- Select the “Return” button to go back to the Plan Page (Slide 6).



The on-line Account History is intended only for your review and verification. Please consider the following when reviewing the Account History:



- There will be a delay between when the filing is submitted and when it shows on the Account History, the length of which can vary (e.g., periodic updates to our systems can result in longer delays). To determine whether there are any ongoing delays, see the FAQ "How do I know a premium filing was received by PBGC?" (on the Online Premium Filing (My PAA) page of our Web site www.pbgc.gov).
- If an amount owed is present, please contact us to get payment details and, if applicable, an updated amount owed (due to the time delays involved).
- If there is any questionable data, for example, any unexpected payments or overpayments reflected on the Account History, please contact us for further analysis.

To reach the Practitioner Contact Center, please call toll-free 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. You may also e-mail your questions to premiums@pbgc.gov.

For more information about what an Account History is, please click the "About Account Histories" button on the Plan Page.

Selecting the "Return" button will return you to the Plan page.

Selecting the "Continue" button will display the Account History.

 [Return](#) [Continue](#) 

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Account History Page

- ▶ Review and verify the Account History for the given Plan.
- ▶ Close the Account History by selecting the close symbol “x” on the top right corner of the browser and continue your review of the Plan page (Slide 6).

PBGC - PREMIUM SYSTEM								
ACCOUNT HISTORY								
Report ID : RBR110			AS OF: 06/30/2016			Page No :2 Of 2		
Report Date : 03/27/2017			EIN/PN/Plan ID: 55-6666666 / 777					
Report Time : 11:23:34								
PLAN NAME: Retirement Plan 4						PLAN EFFECTIVE: 01/01/2010		
ADDRESS:						PLAN STATUS: Active		
PLAN YEAR	PCOUNT	PREMIUM	DUE DATE	RATE	PREMIUM DUE	INTEREST DUE	PENALTY DUE	TOTALS
01/01/2010	5	FLAT	04/30/2011	9.00	45.00	8.57	45.00	98.57
				0.009	0.00	0.00	0.00	0.00
Final filing was received and a balance is due							AMOUNT DUE	98.57
PAYMENTS & ADJUSTMENTS							FILING DATE	
Multiemployer Plan							AMOUNT OWED	98.57
Coverage Start Date 01/01/2010								
Coverage End Date								
Interest is compounded daily. Interest rates are as follows.								
From	To	Rate	From	To	Rate			
10/01/2016	12/31/2016	0.04	07/01/2016	09/30/2016	0.04			
04/01/2016	06/30/2016	0.04	01/01/2016	03/31/2016	0.03			
10/01/2015	12/31/2015	0.03	07/01/2015	09/30/2015	0.03			
04/01/2015	06/30/2015	0.03	01/01/2015	03/31/2015	0.03			
10/01/2014	12/31/2014	0.03	07/01/2014	09/30/2014	0.03			
04/01/2014	06/30/2014	0.03	01/01/2014	03/31/2014	0.03			
10/01/2013	12/31/2013	0.03	07/01/2013	09/30/2013	0.03			

