

My Plan Administration Account (My PAA) Review In-Process Filing(s) in Your Account

Review In-Process Filing(s) in Your Account

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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Review In-Process Filing(s) in Your Account

Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the “Review In-Process Filings(s)” link in the Returning User section.
 - ❖ The All In-Process Filings(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”.

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 In-Process Filing(s) in Your Account

From the Home Page

- You can review up to 10 screen-prepared and imported Filings in the “In-Process Filings” section. If necessary, select the “View All In-Process Filings” link, to see all of the Plan’s In-Process Filings (Slide 5).
- Select the appropriate “Filing” link in the Filing column of the In-Process Filings section.
 - ❖ The “Filing Manager” page will be displayed (Slide 6).

Note 1: You can sort the columns to find a particular filing.

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

The screenshot displays the My PAA Home Page. At the top, there is a navigation menu with links for LAUNCH PAGE, HOME, PLANS, FILINGS, HELP, and DEMOS. A welcome message "Welcome, Jack Black!" and "My Account Logout" are visible. The main content area is titled "Home Page" and contains several sections:

- Quick Links:** Includes buttons for "Add Plan", "Create Filing", "Import Filing", and "Upload Filing".
- Right Now:** A summary of counts: 5 Filings Count (In-Process), 5 You Hold, 0 Others Hold, and 5 Plans Count.
- In-Process Filings:** A table listing filings with columns for Filing, Last Routed, Plan Name, EIN/PN, and Held By. A red arrow points to the "View all In-Process Filings" link above the table, and another red arrow points to the first row of the table.
- Plans in Jack Black's Account:** A table listing plans with columns for Plan Name, EIN/PN, and Actions. It includes a search bar and a "Search" button.
- Import Software-Prepared Filing(s):** A section for importing filing data, with an "Import Filing(s)" button.
- Upload Software-Prepared Filing(s):** A section for uploading filing data, with a "View all Uploads" link.

Review In-Process Filing(s) in Your Account

From the All In-Process Filing(s) Page

- Default radio button shows all of the Plan's screen-prepared and imported In-Process Filings.
- Select the "Held By Me" radio button to display In-Process Filings held by you.
- Select the "Held By Others" radio button to display In-Process Filings held by others.
- Select the appropriate "Filing" link in the Filing column.
 - ❖ The "Filing Manager" page will be displayed (Slide 6).

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 Plan	88-8888888/ 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
 2015 Comprehensive 		Retirement Plan3	44-5555555/ 777	Jack Black

Review In-Process Filing(s) in Your Account

Filing Manager Page

- Filing Status: Shows whether the filing is ready for submission and who is holding the filing.
- If the person holding the filing is not available to route the filing for the necessary action to be taken, you can select the “Retrieve Filing” button that will show in the Filing Status section.
- Filing Task List: The buttons that show depend upon your filing “permissions” and who is holding the filing.
 - ❖ Select the “View/Edit Filing” button to view or edit a comprehensive filing.
 - ❖ Select “Sign” button to certify a comprehensive filing as a Plan Administrator (PA) or PA Representative.
 - ❖ Select “Sign” button as Plan Actuary to certify the actuarial information of the comprehensive filing.
 - ❖ Select “Authorize” button as Paying Agent to submit a payment or identify the type of payment that will be made.
- Filing Team Section: Used to route the filing to other team members.
- Select the appropriate link to Logout of My PAA or to go to another page (e.g., the Plan page).

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

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

Retirement Plan3 – 44-5555555 / 777

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

Filing Manager

This Filing Has **NOT** Been Submitted [Go to Plan Page](#)

Filing Status

Filing is: not ready for submission (refer to 'To submit this filing' below)
 You are holding the filing

Filing Task List [Instructions](#)

[View/Edit Filing](#) ✓ This filing has the required information but will undergo additional validations upon submission. Please click the View Filing button to review the warnings that are displayed and the accuracy of the data before the filing is submitted. [Delete Filing](#)

[Sign](#) Sign as Plan Administrator or PA Representative

[Sign](#) Sign as Actuary

[Authorize](#) Authorize as Paying Agent

[Attach File](#)

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.

Filing Team [Instructions](#)

The filing coordinator can change permissions from the [plan page](#)

Name	Permissions	Phone	E-mail	
Jack Black	Plan Administrator, View Account History, Actuary, Preparer, Paying Agent, Filing Coordinator	123-123-1234	jblack@workemail.com	Holding
Sue Practitioner	Preparer, Plan Administrator, Actuary,	202-222-4000	spractitioner@workemail.com	Route To