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

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My PAA Login Page

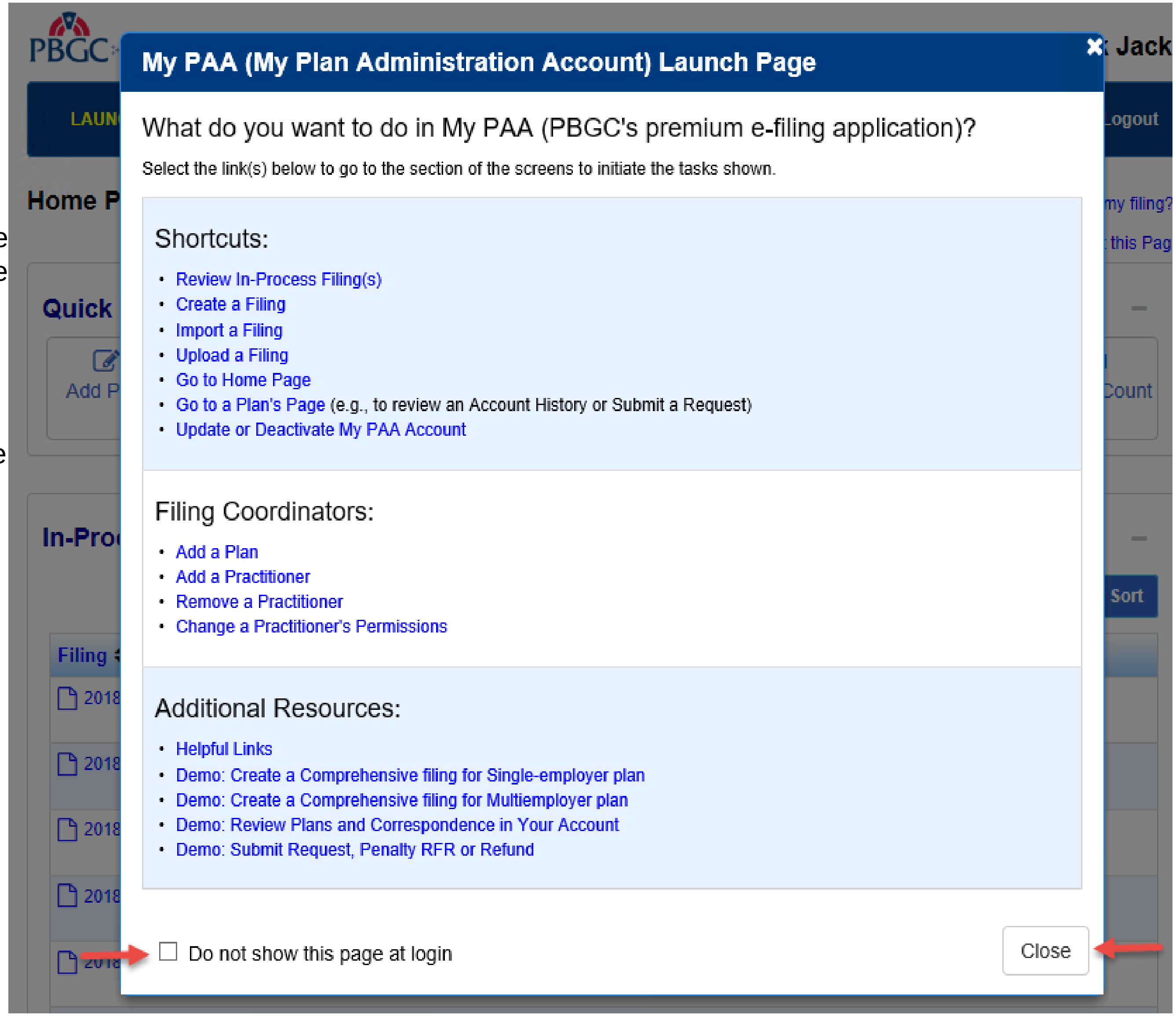
- Enter your User ID into the field labeled “User ID” on the My PAA login page.
- Enter your Password into the field labeled “Password”.
- Select the button labeled “Login“.

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”.



Review In-Process Filing(s) in Your Account

From the Home Page

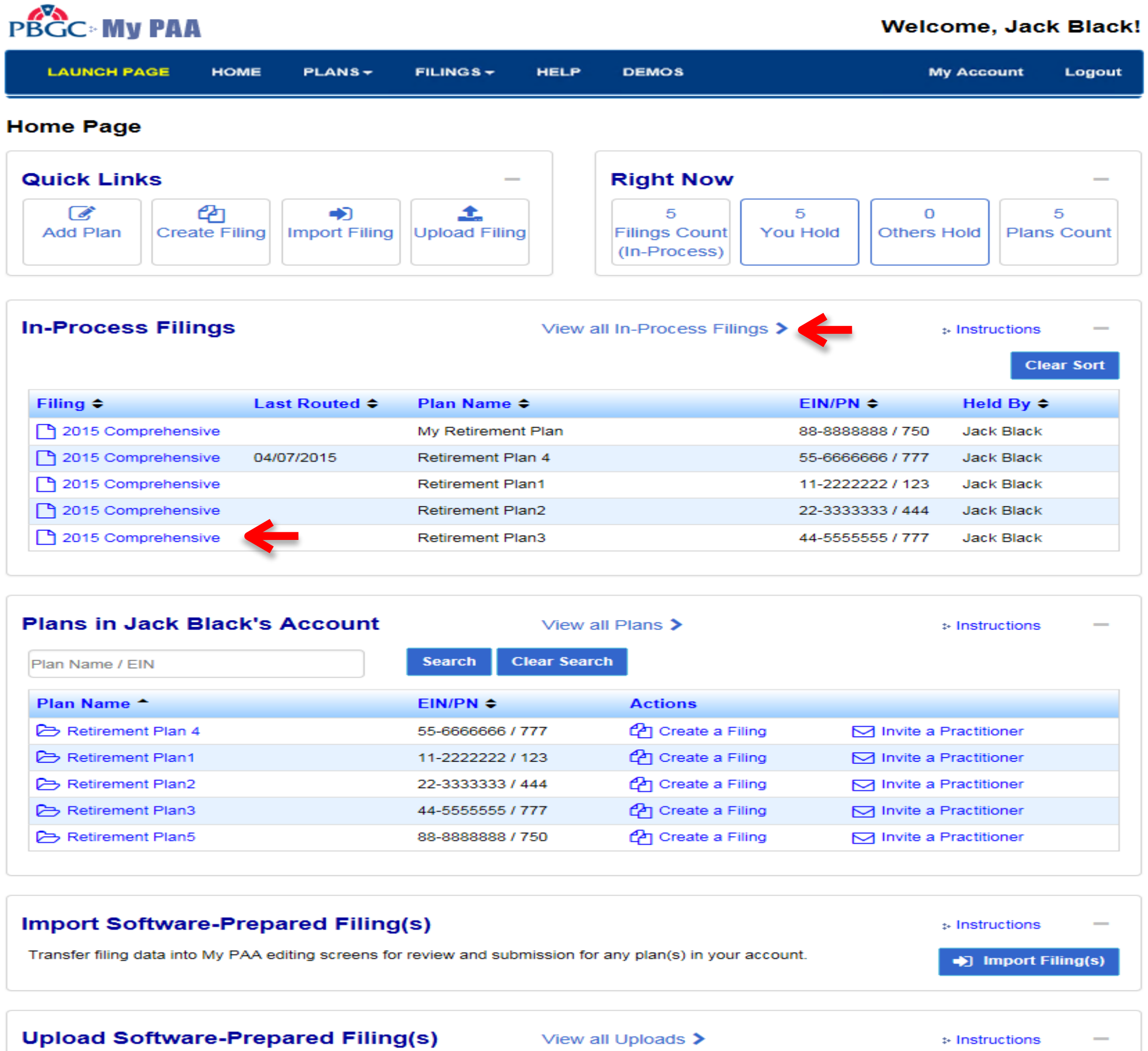
- You can review up to 10 screen-prepared and imported Filings in the "In-Process Filings" section. If necessary, select the "View All In-Process Filings" link, to see all of the Plan's In-Process Filings (Slide 5).

- 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 Launch Page and Help information.

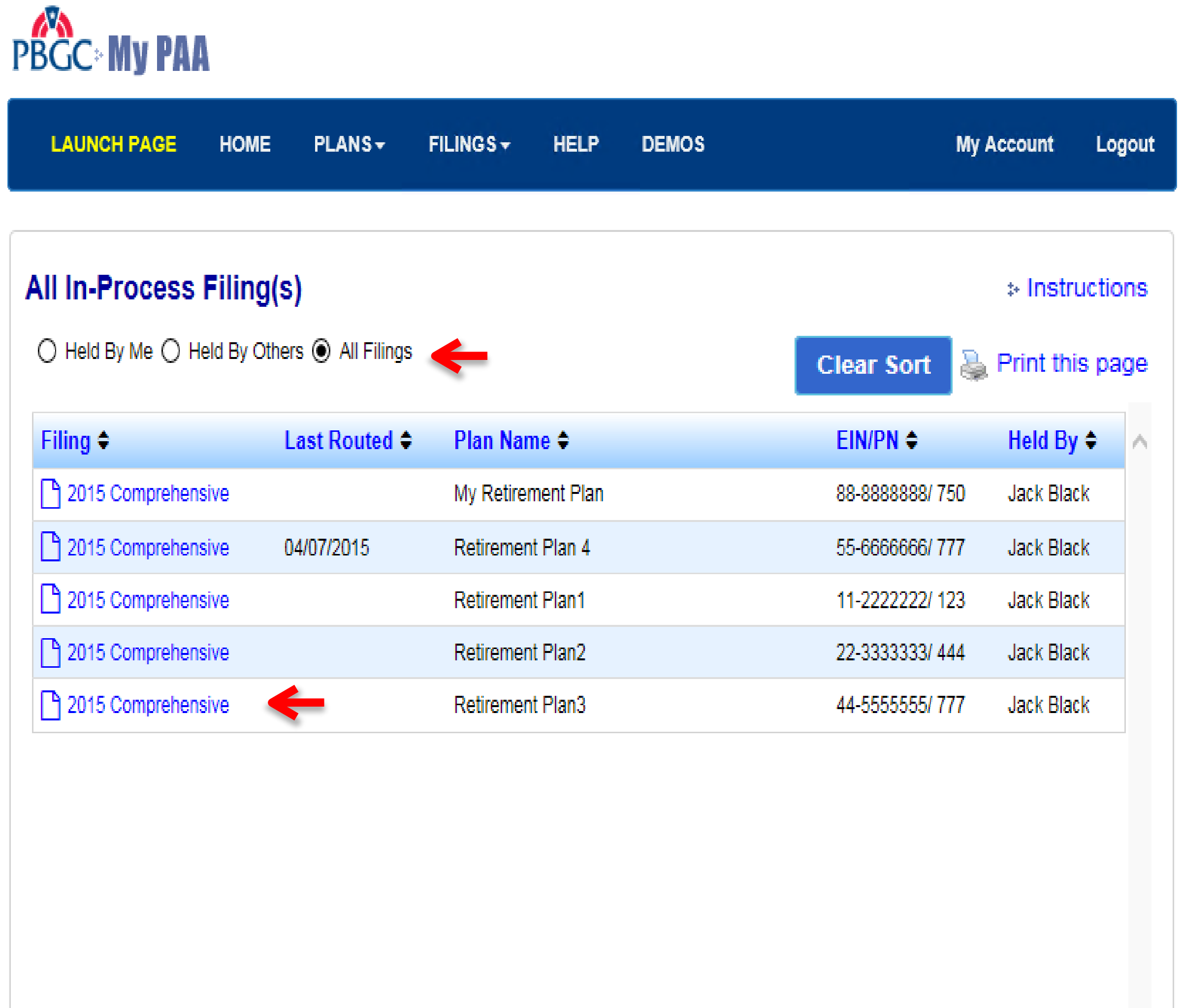


Review In-Process Filing(s) in Your Account

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.



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).