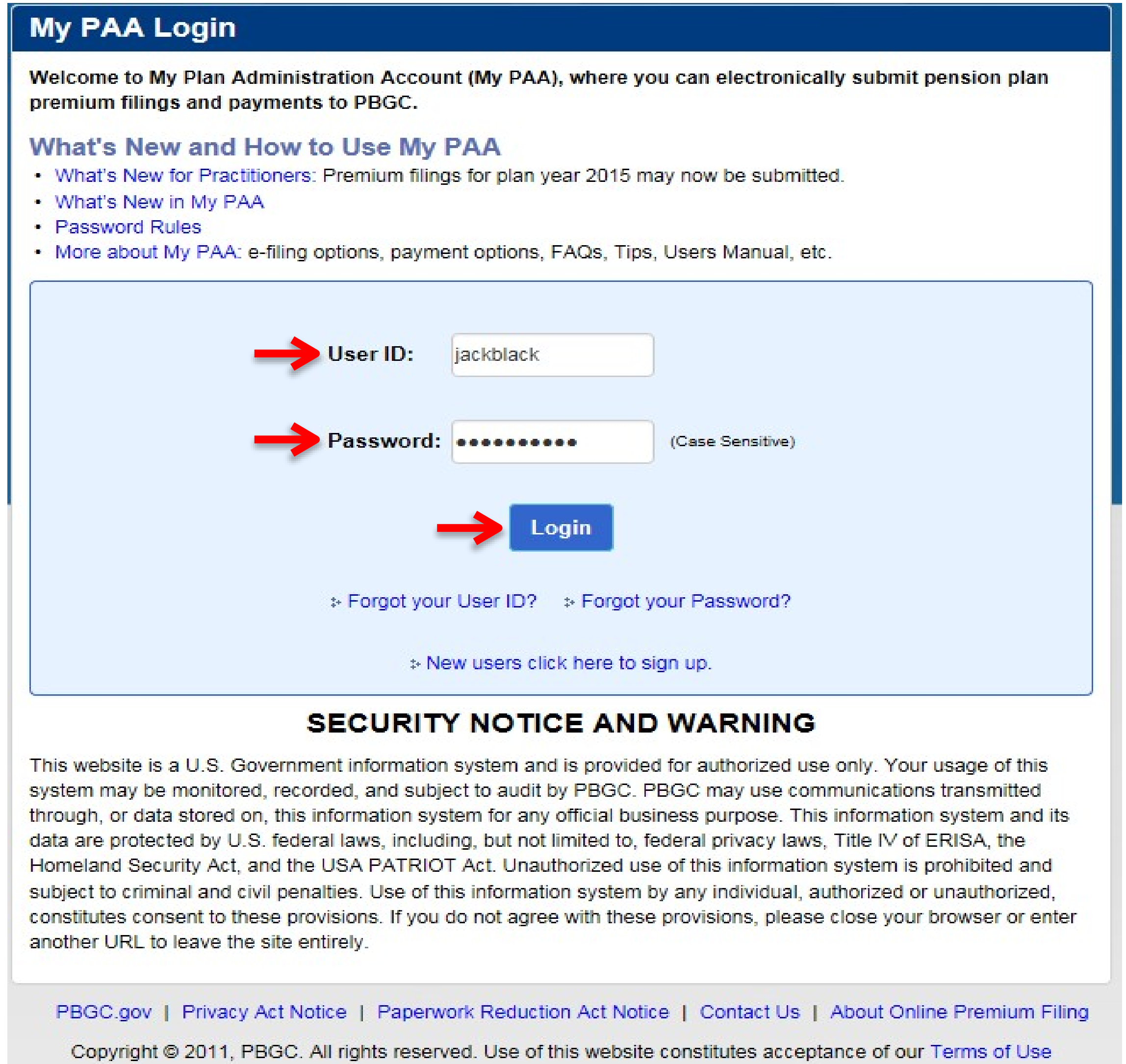
My Plan Administration Account (My PAA) Review Plans and Correspondence in Your Account

Review Plans and Correspondence 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“.

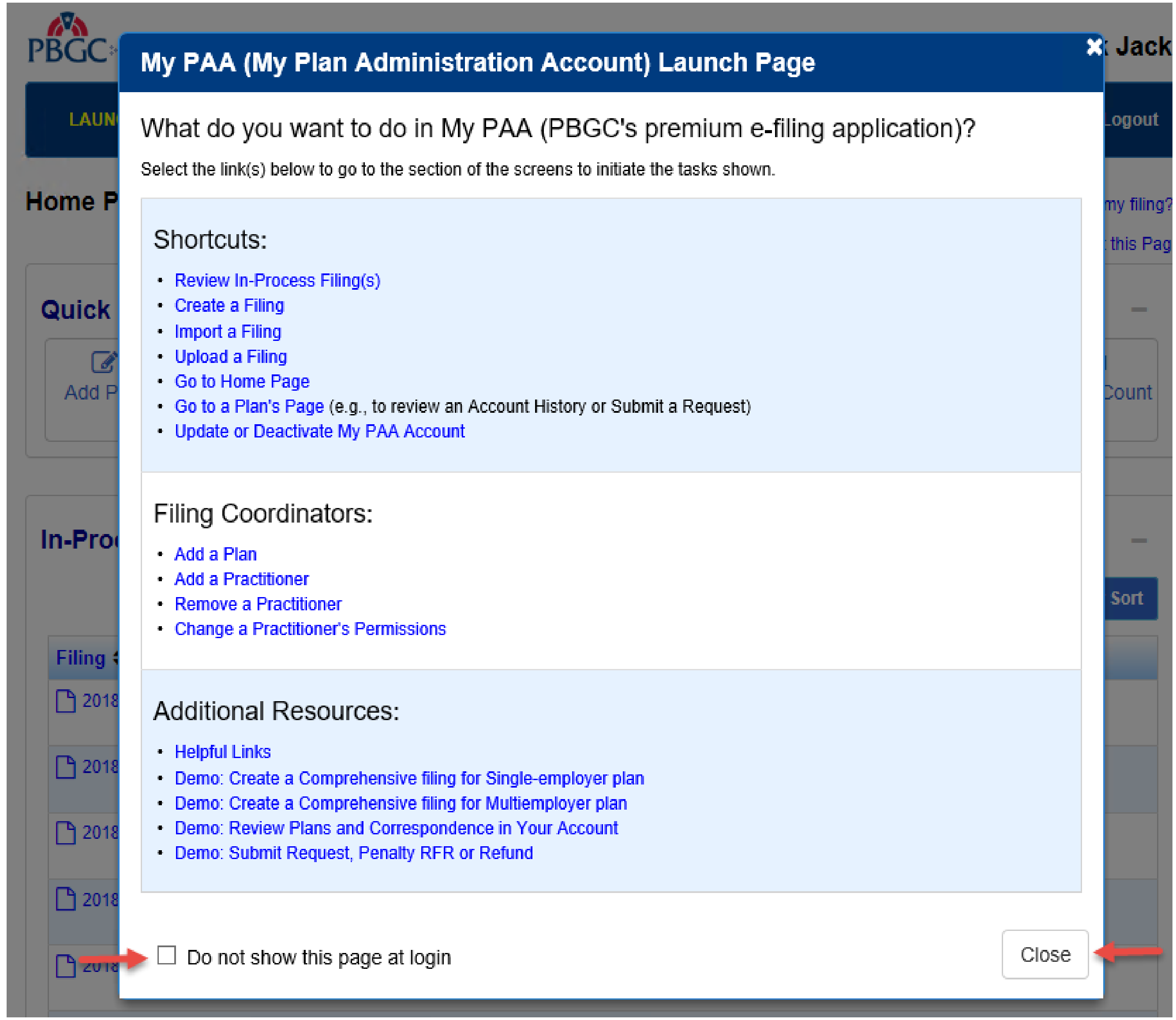


Review Plans and Correspondence in Your Account

Launch Page

- You are now logged into My PAA.
- If the Launch Page overlaid on top of your Home Page is displayed, select the "Go to a Plan's Page" link in the Returning Users 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".



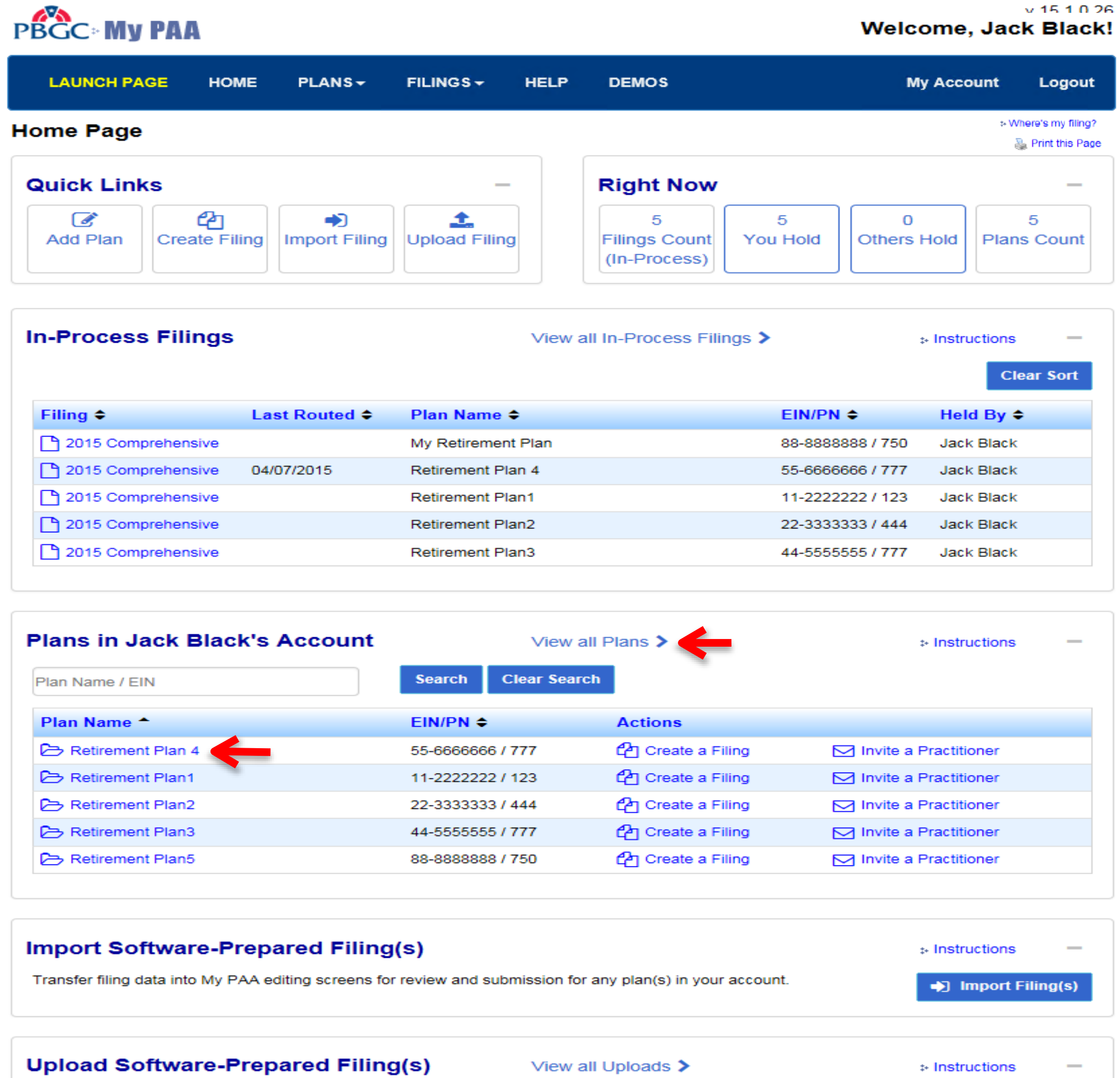
Review Plans and Correspondence in Your Account

From the Home Page

- You can review up to 10 plans in alphabetical order in the Plans in your Account section. If necessary, select the “View all Plans” link to see all of your Plans (Slide 5).
- Select the appropriate plan name from the “Plan Name” column in the Plans in your Account section.
    - The Plan Page will be displayed (Slide 6).

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.

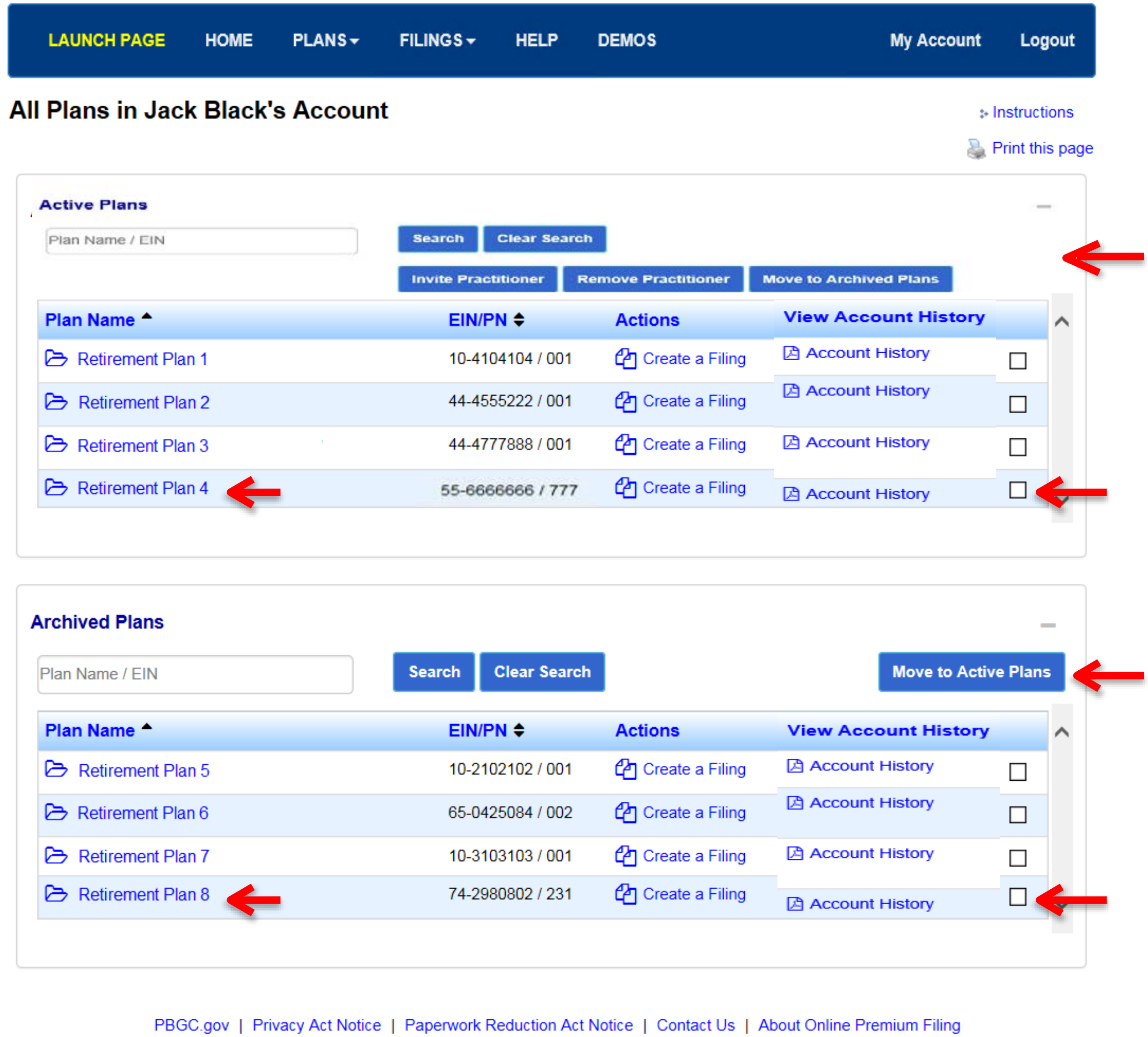


Review Plans and Correspondence in Your Account

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 the Active and Archived Plans sections.

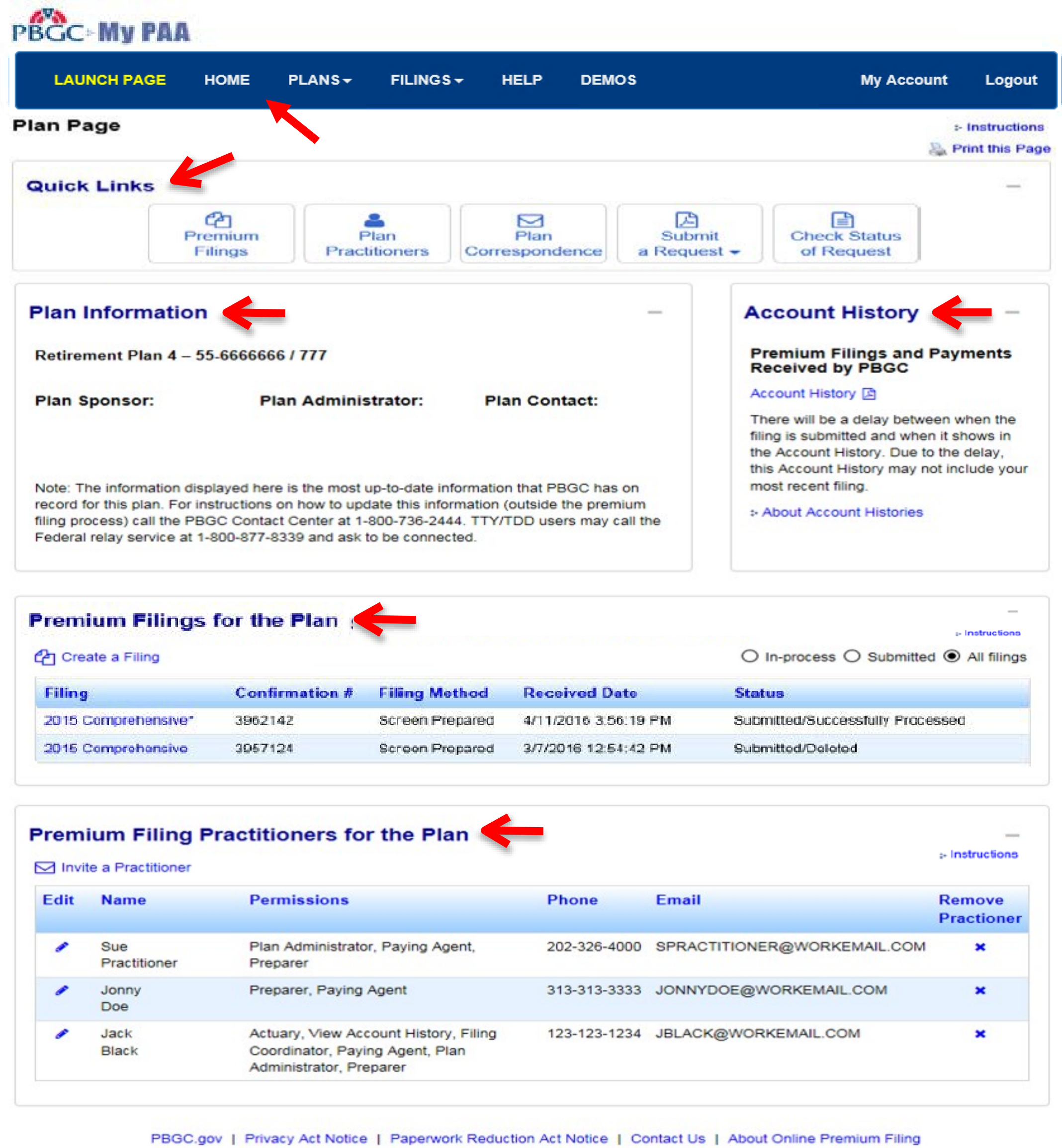


Review Plans and Correspondence in Your Account

Plan Page

- **Quick Links:**
  - Select a link to go directly to the Premium Filings section, the Plan Practitioners section, the Plan Correspondence page, Submit a Request, or Check Status of Request.
- **Plan Information:**
  - Review Plan Sponsor, Plan Administrator, and Plan Contact in the Plan Information section.
- **Account History:**
  - Select “Account History” link to continue to Account History.
  - Select “About Account Histories” link to learn about the data on the Account Histories.

  Note: You must have been given the “permission” to view the plan’s Account History.
- **Premium Filings for the Plan:**
  - “All Filings” is the default option selected, which displays the In-Process Filings first and then the Submitted filings.
  - Select a “Filing” Link to review an In-Process filing via the Filing Manager Page or to review the receipt for a submitted filing.
- **Premium Filing Practitioners for the Plan:**
  - Review practitioner permissions for the Plan in the “Premium Filing Practitioners” section.
- Select the appropriate link to logout of My PAA or to go to another page (e.g., the Home page).



Review Plans and Correspondence in Your Account

➢ Plan Correspondence Page:

- ❖ The page displays the premium correspondence that was/will be mailed to the Plan Administrator.
- ❖ View the Document Type which describes the type of correspondence sent near the Entry Date for the plan (EIN/PN).
- ❖ Select the UID link to view a copy of the correspondence described.

Note: A message will show if the premium correspondence is not available at that time.

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