

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”.

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 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”.

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 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.

The screenshot displays the My PAA Home Page. At the top, there is a navigation menu with options: LAUNCH PAGE, HOME, PLANS, FILINGS, HELP, DEMOS, My Account, and Logout. The page is titled "Home Page" and includes a "Quick Links" section with buttons for Add Plan, Create Filing, Import Filing, and Upload Filing. A "Right Now" summary shows 5 Filings Count (In-Process), 5 You Hold, 0 Others Hold, and 5 Plans Count. The "In-Process Filings" table lists several filings with columns for Filing, Last Routed, Plan Name, EIN/PN, and Held By. Below this is the "Plans in Jack Black's Account" section, which includes a search bar and a table of plans with columns for Plan Name, EIN/PN, and Actions. A red arrow points to the "View all Plans" link, and another red arrow points to the "Retirement Plan 4" row in the table. At the bottom, there are sections for "Import Software-Prepared Filing(s)" and "Upload Software-Prepared Filing(s)".

Home Page

Quick Links

- Add Plan
- Create Filing
- Import Filing
- Upload Filing

Right Now

- 5 Filings Count (In-Process)
- 5 You Hold
- 0 Others Hold
- 5 Plans Count

In-Process Filings

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

Plans in Jack Black's Account

View all Plans >

Plan Name / EIN Search Clear Search

Plan Name	EIN/PN	Actions
Retirement Plan 4	55-6666666 / 777	Create a Filing Invite a Practitioner
Retirement Plan1	11-2222222 / 123	Create a Filing Invite a Practitioner
Retirement Plan2	22-3333333 / 444	Create a Filing Invite a Practitioner
Retirement Plan3	44-5555555 / 777	Create a Filing Invite a Practitioner
Retirement Plan5	88-8888888 / 750	Create a Filing Invite a Practitioner

Import Software-Prepared Filing(s)

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 >

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.



All Plans in Jack Black's Account

[Instructions](#)

[Print this page](#)



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



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

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).

The screenshot shows the PBGC My PAA Plan Page. At the top is a navigation bar with links: LAUNCH PAGE, HOME, PLANS (with a dropdown arrow), FILINGS (with a dropdown arrow), HELP, DEMOS, My Account, and Logout. Below the navigation bar is the 'Plan Page' header. A 'Quick Links' section contains five buttons: Premium Filings, Plan Practitioners, Plan Correspondence, Submit a Request, and Check Status of Request. The 'Plan Information' section displays 'Retirement Plan 4 - 55-6666666 / 777' and lists 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. The 'Account History' section is titled 'Premium Filings and Payments Received by PBGC' and includes a link to 'Account History' and a note about potential delays in filing status updates. The 'Premium Filings for the Plan' section has a 'Create a Filing' button and radio buttons for 'In-process', 'Submitted', and 'All filings' (which is selected). A table lists two filings: '2015 Comprehensive*' and '2015 Comprehensive'. The 'Premium Filing Practitioners for the Plan' section has an 'Invite a Practitioner' button and a table listing three practitioners: Sue Practitioner, Jonny Doe, and Jack Black, each with their permissions, phone, email, and a 'Remove Practitioner' link.

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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).



Item #	Document Type	Entry Date	UID	EIN	PN
1	Other Notice	02/21/2017	LG17021701487337567524	55-6666666	777
2	Statement of Account	02/05/2017	LG17011201484244664465	55-6666666	777
3	Error Notice	02/01/2017	LG17011201484244667015	55-6666666	777