

# **My Plan Administration Account (My PAA) Submit a Comprehensive Filing**

# Submit a Comprehensive Filing

## 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.](#)

### SECURITY NOTICE AND WARNING

This website is a U.S. Government information system and is provided for authorized use only. Your usage of this system may be monitored, recorded, and subject to audit by PBGC. PBGC may use communications transmitted through, or data stored on, this information system for any official business purpose. This information system and its data are protected by U.S. federal laws, including, but not limited to, federal privacy laws, Title IV of ERISA, the Homeland Security Act, and the USA PATRIOT Act. Unauthorized use of this information system is prohibited and subject to criminal and civil penalties. Use of this information system by any individual, authorized or unauthorized, constitutes consent to these provisions. If you do not agree with these provisions, please close your browser or enter another URL to leave the site entirely.

[PBGC.gov](#) | [Privacy Act Notice](#) | [Paperwork Reduction Act Notice](#) | [Contact Us](#) | [About Online Premium Filing](#)

Copyright © 2011, PBGC. All rights reserved. Use of this website constitutes acceptance of our [Terms of Use](#)

# Submit a Comprehensive Filing

## 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 Filing(s)” link in the Returning User section.
  - ❖ The All In-Process Filing(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”.

The screenshot shows a modal window titled "My PAA (My Plan Administration Account) Launch Page" overlaid on a background of the PBGC website. The modal has a dark blue header with the title and a close button (X). Below the header, the text asks "What do you want to do in My PAA (PBGC's premium e-filing application)?" and instructs the user to "Select the link(s) below to go to the section of the screens to initiate the tasks shown." The modal is divided into three sections: "Shortcuts:", "Filing Coordinators:", and "Additional Resources:". Each section contains a list of blue hyperlinks. At the bottom of the modal, there is a checkbox labeled "Do not show this page at login" and a "Close" button. Red arrows point to the checkbox and the "Close" button.

**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

# Submit a Comprehensive Filing

## From the Home Page

- Select the appropriate “Filing” link in the In-Process Filings section.
  - ❖ The “Filing Manager” page will be displayed (Slide 6).
- If necessary, select the “View all in-Process Filings” to see all of the plan’s in-process filings (Slide 5).

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.

The screenshot displays the PBGC My PAA Home Page for user Jack Black. At the top, a navigation bar includes links for LAUNCH PAGE, HOME, PLANS, FILINGS, HELP, and DEMOS, along with My Account and Logout options. Below the navigation bar, the Home Page section features Quick Links (Add Plan, Create Filing, Import Filing, Upload Filing) and a Right Now summary (5 Filings Count, 5 You Hold, 0 Others Hold, 5 Plans Count). The In-Process Filings section shows a table of 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, and another red arrow points to the '2015 Comprehensive' filing in the table. Below this, the Plans in Jack Black's Account section shows a search bar and a table of plans with actions like 'Create a Filing' and 'Invite a Practitioner'. At the bottom, there are sections for Import Software-Prepared Filing(s) and Upload Software-Prepared Filing(s).

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 Plan 1	11-2222222 / 123	Jack Black
2015 Comprehensive		Retirement Plan2	22-3333333 / 444	Jack Black
2015 Comprehensive		Retirement Plan3	44-5555555 / 777	Jack Black

Plan Name	EIN/PN	Actions
Retirement Plan 4	55-6666666 / 777	Create a Filing, Invite a Practitioner
Retirement Plan 1	11-2222222 / 123	Create a Filing, Invite a Practitioner
Retirement Plan 2	22-3333333 / 444	Create a Filing, Invite a Practitioner
Retirement Plan 3	44-5555555 / 777	Create a Filing, Invite a Practitioner
Retirement Plan 5	88-8888888 / 750	Create a Filing, Invite a Practitioner

# Submit a Comprehensive Filing

## From the All In-Process Filing(s) Page

- 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.



v.15.1.0.26

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

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

# Submit a Comprehensive Filing

## Filing Manager Page

- This page confirms that all the tasks in the “Filing Task List” section have been completed and the filing is ready for submission.
  - The Filing Coordinator or PA/PA Rep must hold the filing in order to see the “Submit Now” or Submit Later” buttons.
  - Select the “Submit Now” button to go to Submit Confirmation Page (Slide 7).
- OR
- Select the “Submit Later” button to go to the Schedule Filing and Payment (if any) Submission Page (Slide 8).

Note: The “Submit Later” button only shows if there is an amount due.

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

**Step 3: Submit Filing (with payment, if due)** [View Account History](#)

**Retirement Plan3 – 44-5555555 / 777**

**Filing Manager** [Go to Plan Page](#)

**Filing Status**

Filing is:  ready for submission (refer to 'To submit this filing' below)

➔
Submit Now
Submit Later
➔

Note: Click the "submit now" button only once or you may encounter an error.

**Filing Task List** [Instructions](#)

<a href="#">View/Edit Filing</a>	<input checked="" type="checkbox"/> This filing has the required information but will undergo additional validations upon submission. Please click the <a href="#">View Filing</a> button to review the accuracy of the data before the filing is submitted.	<a href="#">Delete Filing</a>
<a href="#">Edit E-Payment</a>	<input checked="" type="checkbox"/> Plan Administrator or PA Representative e-signature completed 12:57 PM, 4/1/2016 Eastern Time <a href="#">Remove Signature</a> <input checked="" type="checkbox"/> Enrolled Actuary e-signature completed 12:58 PM, 4/1/2016 Eastern Time <a href="#">Remove Signature</a> <input checked="" type="checkbox"/> Authorization for payment alternative completed Payment alternative selected: Other 4:26 PM, 4/12/2016 Eastern Time	
<a href="#">Attach File</a>		

**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.

**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	
Tommy Testing	Filing Coordinator, Actuary, Paying Agent, Preparer, Plan Administrator, View Account History	972-458-9888	beth.test@pbgc.govxx	Holding
Kothap Xwcpfpunm Puk	Paying Agent, Plan Administrator, Preparer, View Account History, Filing Coordinator	270-960-7894	nus@yqcf.wvr	<a href="#">Route To</a>
Tjmnxm Aehyn	View Account History, Paying Agent, Preparer, Plan Administrator, Filing Coordinator	915-711-4641	fcwvm@rshr.qsg	<a href="#">Route To</a>

# Submit a Comprehensive Filing



## Submit Now Confirmation Page

- This page asks you to confirm that you are ready to submit the filing.
- If you are not ready, select the “Return” button to go to the Filing Manager page (Slide 6).
- If you are ready, select the “Submit” button to submit the filing to PBGC and see the Receipt (slide 7).



## Submit Confirmation

Are you sure you are ready to submit the 2015 Comprehensive Premium Filing to PBGC? Selecting the "Submit" button will send the filing to PBGC. Selecting the "Return" button will return you to the Filing Manager page.

 [Return](#) [Submit](#) 

[PBGC.gov](#) | [Privacy Act Notice](#) | [Paperwork Reduction Act Notice](#) | [Contact Us](#) | [About Online Premium Filing](#)

# Submit a Comprehensive Filing

## Submit Later - Schedule Filing and Payment (if any) Submission Page

- Enter the date you want the filing/payment to be submitted.
- Select the “OK” button to schedule the filing for submission and see the Receipt (Slide 8).



[LAUNCH PAGE](#) [HOME](#) [PLANS](#) [FILINGS](#) [HELP](#) [DEMOS](#) [My Account](#) [Logout](#)

### Schedule Filing and Payment (if any) Submission

Please enter the date you would like this filing and payment (if the payment was made using My PAA) to be automatically submitted to PBGC. You will receive an e-mail notification when your filing and payment (if the payment was made using My PAA) are received by PBGC.

Submit this filing and payment (if any) on:

05/01/2015

Cancel

OK



[PBGC.gov](#) | [Privacy Act Notice](#) | [Paperwork Reduction Act Notice](#) | [Contact Us](#) | [About Online Premium Filing](#)



# Submit a Comprehensive Filing

## Receipt for Comprehensive Premium Filing Page

- Review and verify the Receipt which shows the filing details.
- Select the close symbol “x” on the top right corner of the browser to close the Receipt and to go to the Confirmation page (slide 10).

## Comprehensive Premium Filing Confirmation

\*\*\* This confirmation is NOT a receipt of payment \*\*\*

Date/Time Filing Submitted: 05/01/2015 6:00:00 AM Eastern Time

Your My PAA Confirmation Number for this transaction is: **4118905**

Current Filing Status: **Submitted/Successfully Processed**

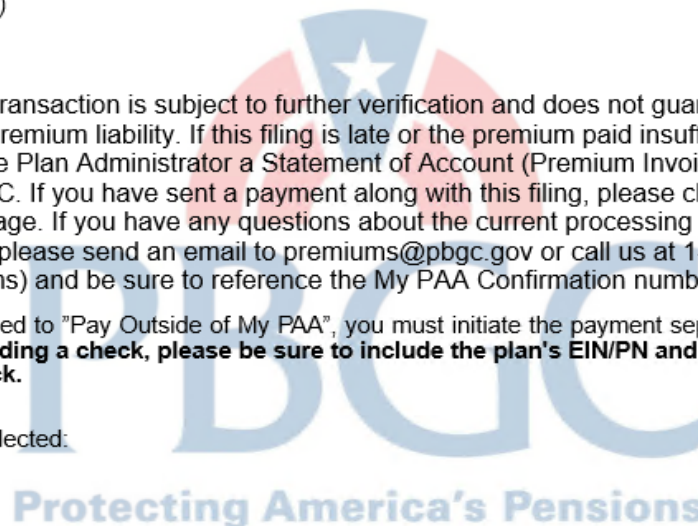
*(The filing was accepted and has posted to the plan's Account History. If there is an active Status link on the Plan page, it means a filing error was detected. Click the Status link (if present) on the Plan page to see the detailed error message and determine if a correction is necessary. Contact the Premium Customer Service Center for additional information and any assistance you may need.)*

Please note that this transaction is subject to further verification and does not guarantee satisfaction of filing requirement or premium liability. If this filing is late or the premium paid insufficient, PBGC will subsequently send the Plan Administrator a Statement of Account (Premium Invoice) that shows the amount owed to PBGC. If you have sent a payment along with this filing, please check the plan's account history via the Plan Page. If you have any questions about the current processing status of this filing or your payment status, please send an email to [premiums@pbgc.gov](mailto:premiums@pbgc.gov) or call us at 1-800-736-2444 (select option "2" for premiums) and be sure to reference the My PAA Confirmation number.

**Important:** If you selected to "Pay Outside of My PAA", you must initiate the payment separate from submitting the filing. **If you are sending a check, please be sure to include the plan's EIN/PN and Plan Year Commencing (PYC) date on the check.**

Payment Alternative Selected:  
Flat-rate Premium:  
Variable-rate Premium:  
Premium Credit:  
Premium Amount Due:

N/A  
\$120,336.00  
\$901,648.00  
\$1,021,984.00  
\$0.00



# Submit a Comprehensive Filing

## Confirmation of Premium Filing Submission Page

- This confirms that you have successfully submitted your premium filing to PBGC and completed the filing process (Step 4).

Note: If you selected the “Submit Later” button, the filing will be submitted on the requested date.

- Select the appropriate link/button to log out of My PAA or go to another page (e.g., Return to Home Page).



[LAUNCH PAGE](#)

[HOME](#)

[PLANS](#) ▾

[FILINGS](#) ▾

[HELP](#)

[DEMOS](#)

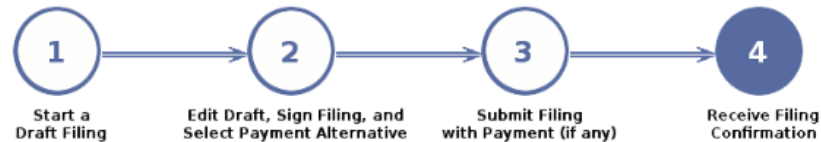
[My Account](#)

[Logout](#)



### Step 4: Confirmation of Premium Filing Submission

Comprehensive Filing for Plan Year Commencing 1/1/2015  
Retirement Plan3 – 44-5555555 / 777



#### Confirmation of Premium Filing Submission

This confirms that the premium filing was successfully submitted to PBGC (or will be submitted if “submit later” was selected). The e-filing process is now complete.

The filing receipt can be accessed on the Plan Page. In addition, the filing and payment (if any) will typically be posted within a few days to the plan’s Account History, which reflects the plan’s premium filing history by plan year. The Account History can be viewed on the Plan Page if you have the “view account history permission”, which is assigned by the plan’s Filing coordinator.

[Return to Home Page](#)



[PBGC.gov](#) | [Privacy Act Notice](#) | [Paperwork Reduction Act Notice](#) | [Contact Us](#) | [About Online Premium Filing](#)