

My Plan Administration Account (My PAA) Submit a Request: CSEC Filing



Pension Benefit Guaranty Corporation
Protecting America's Pensions

Submit a Request: CSEC 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

- [Premium Filing & Payment Instructions](#)
- [What's New in My PAA & Reminders](#) (see January 2019 updates, including Plan Correspondence Quick Link enhancement)
- [Demos](#) (Add a plan, Upload Software-Prepared Filing(s) via My PAA, etc)
- [Password Rules & Manage Your Account](#)
- [What's New for Practitioners](#) (review or sign-up to receive updates) & [Sign up for Filing Reminders](#)
- [Premium Disaster Relief](#)
- [Premium Contact Information](#) (premiums@pbgc.gov or 1-800-736-2444 & select "2" for premiums)
- Use Compatible Browsers: Please use the latest browser versions (Microsoft IE 11.0, Google Chrome 65.0 and higher, Mozilla Firefox 54.0 and higher) to prevent connectivity issues with My PAA due to security-related updates

The screenshot shows the My PAA Login page. It features a light blue background with a white border. At the top, there is a header "My PAA Login". Below the header, there is a welcome message. Underneath, there is a section titled "What's New and How to Use My PAA" with a list of links. The main login area is a white box with a blue border. It contains three input fields: "User ID:" with the value "johndoe", "Password:" with masked characters "••••••••", and a "Login" button. Red arrows point to each of these three elements. Below the login fields, there are links for "Forgot your User ID?", "Forgot your Password?", and "New users click here to sign up."

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Submit a Request: CSEC Filing

Launch Page

- You are now logged into MyPAA.
- 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 3).
- 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

Submit a Request: CSEC Filing

From the All Plans in Your Account Page

- Select the appropriate plan in the “Plan Name” column.
- The “Plan Page” will be displayed (Slide 5).
- 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.

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

All Plans in Jack Black's Account

[Instructions](#)
[Print this page](#)

Active Plans

Plan Name / EIN Search Clear Search

Invite Practitioner Remove Practitioner **Move to Archived Plans**

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"/>

Archived Plans

Plan Name / EIN Search Clear Search **Move to Active Plans**

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"/>

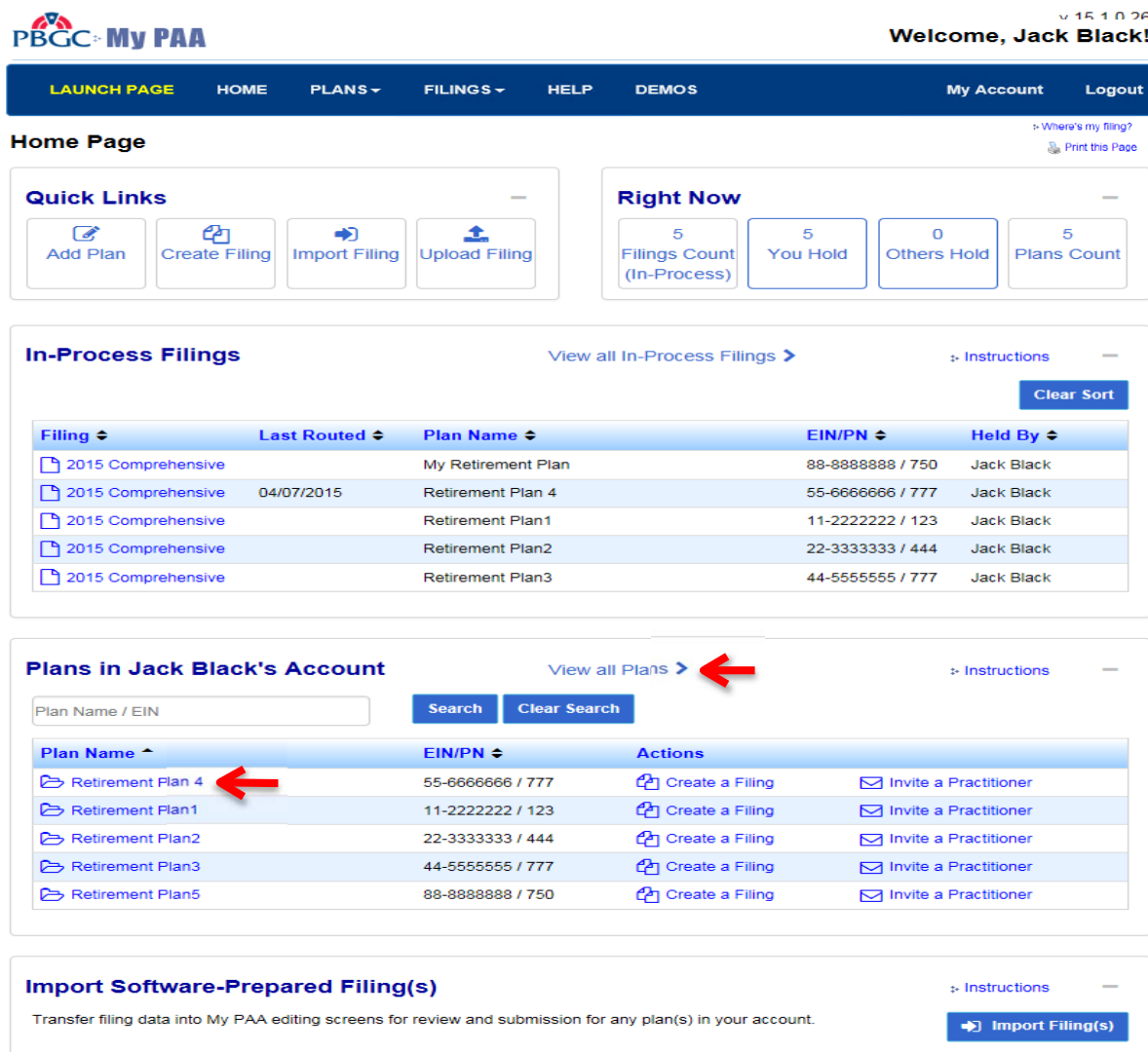
Submit a Request: CSEC Filing

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 (Slide3).
- Select the appropriate plan name from the “Plan Name” column in the Plans in your Account section.
 - ❖ The Plan Page will be displayed (Slide5).

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 shows the PBGC My PAA Home Page. At the top is a navigation bar with links: LAUNCH PAGE, HOME, PLANS, FILINGS, HELP, DEMOS, My Account, and Logout. The user is logged in as Jack Black. The page is divided into several sections:

- 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:** A table with columns: Filing, Last Routed, Plan Name, EIN/PN, and Held By. It lists five filings for various retirement plans.
- Plans in Jack Black's Account:** A table with columns: Plan Name, EIN/PN, and Actions. It lists five retirement plans. A red arrow points to the "View all Plans" link above the table, and another red arrow points to the "Retirement Plan 4" in the Plan Name column.
- Import Software-Prepared Filing(s):** A section with a description and an "Import Filing(s)" button.

Submit a Request: CSEC Filing

Plan Page

➤ Quick Links:

- ❖ Select the Quick Link for “Submit a Request”.
- ❖ Select “Other Requests & Correspondence”



LAUNCH PAGE HOME PLANS FILINGS HELP DEMOS My Account Logout

Plan Page

[Instructions](#) [Print this Page](#)

Quick Links

- Premium Filings
- Plan Practitioners
- Plan Correspondence
- Submit a Request** ▼
- Check Status of Request

Plan Information

Retirement Plan

Plan Sponsor: **Plan Administrator:** **Plan Contact:**

Note: The information displayed here is the most up-to-date information that PBGC has on record for this plan. For instructions on how to update this information (outside the premium filing process) call the PBGC Contact Center at 1-800-736-2444. TTY/TDD users may call the Federal relay service at 1-800-877-8339 and ask to be connected.

Account History

There will be a delay between when the filing is submitted and when it shows in the Account History. Due to the delay, this Account History may not include your most recent filing.

[About Account Histories](#)

Penalty RFR

Premium Refund (PA/PA Rep Only)

Other Requests & Correspondence

Account History

Filing History

Submit a Request: CSEC Filing

From the Other Requests and Correspondence Page

- Click on the “Request Type” drop down and select “**Submit CSEC Filing**”

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Other Requests and Correspondence

[Instructions](#)

The “Other Requests” page is intended as a portal for My PAA practitioners to upload correspondence directly to the PBGC, whether there is an action tied to the document or not.

This page should take the place of sending an email (for the majority of actionable requests), making a phone call, or having to actually send a paper document in the mail (which would have otherwise been mailed to PBGC’s correspondence lockbox). We expect the majority of items submitted via this page to include an attachment. The drop down selection on this page contains a list a common inquiry topics from PBGC practitioners. Additional detail for each selection can be found by clicking on the *Instructions* link above.

When the request has been successfully submitted, the submitter will receive a confirmation message that includes the Service Request ID. In addition, a confirmation email will be sent to each e-filing team member who has the plan in their account.

You can then track the status of any request created from this page by clicking on the “Check Status of Request” Quick Link from the Plan Page, where full status details are provided. In addition, if you do attach a document with the request, that attachment will be saved and viewed via the “Plan Correspondence” Quick Link from the Plan Page.

Note: We still recommend sending an email directly to premiums@pbgc.gov for action requests which do not require any paper documentation (password resets, Filing Coordinator updates, address changes, etc.).

EIN:

PN: 002

Request Type:

Select one



Select one

Response to "Statement of Account"

Response to "Past Due Filing Notice"

Response to ERISA 4071 Penalty Assessment

Response to "Notice of Filing Error"

Other correspondence - PBGC response required

Other correspondence - No PBGC response required

Request re: Lookback Rule

Submit CSEC Filing

Please select and upload
found by clicking on the

Attachment (Optional)



Select File:

Browse...

Please Note: Any file selected must be a single PDF file which cannot exceed 15MB.



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Submit a Request: CSEC Filing

Submit CSEC Filing

- You must attach the marked-up version of the Comprehensive Premium Filing form (see Technical Update for full details), and you may provide additional comments before proceeding.
- ❖ Select and upload a PDF version of your marked-up Comprehensive Premium Filing, not to exceed 15MB.
- ❖ Enter any Comments, not to exceed 2000 characters.
- ❖ Select the “Next” button to go to the Other Requests and Correspondence Summary Page.

Other Requests and Correspondence

[Instructions](#)

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You can then track the status of any request created from this page by clicking on the “Check Status of Request” Quick Link from the Plan Page, where full status details are provided. In addition, if you do attach a document with the request, that attachment will be saved and viewed via the “Plan Correspondence” Quick Link from the Plan Page.

Note: We still recommend sending an email directly to premiums@pbgc.gov for action requests which do not require any paper documentation (password resets, Filing Coordinator updates, address changes, etc.).

EIN: PN: 002

Request Type:

Please select and upload the PDF document associated with your Other Requests. Additional information related to Other Requests can be found by clicking on the [Instructions](#) link in the above section.

Attachment (Optional):

Select File:

Please Note: Any file selected must be a single PDF file which cannot exceed 15MB.

Comments:

1800/1800 characters remaining

(Maximum number of characters is 1,800)

Submit a Request: CSEC Filing

➤ Request to Submit CSEC Filing:

- ❖ View a summary of the information entered/selected.
- ❖ Select the “Back” button to make any changes or the Cancel button to delete the request.
- ❖ Select the “Submit” button to submit the CSEC Filing to PBGC.
- ❖ Receive confirmation that the request has been successfully submitted.
- ❖ Select the appropriate link to logout of My PAA or to go to another page (e.g., the HomePage).



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[My Account](#) [Logout](#)

Other Requests and Correspondence Summary

EIN:	381686641
PN:	002
Request Type:	Submit CSEC Filing
Attachment:	N/A
Comments:	Testing

[< Back](#) [Cancel](#) [Submit](#)

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Confirmation

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Your Submit CSEC Filing has been successfully submitted. The Service Request Number (SR#) listed below has been created to track the request.

SR#: 647383
EIN/PN: 381686641/002

To check the status of this request, access the Plan Page in My PAA and navigate to the Quick Links section near the top of the page. Next, select the "Check Status of Request" button. Contact PBGC Customer Service if you need assistance.

[Go to Plan Page](#) [Go to Home Page](#)

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Submit a Request: CSEC Filing



Plan Page

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Quick Links

Premium Filings

Plan Practitioners

Plan Correspondence

Submit a Request

Check Status of Request



Plan Information

DEFINED BENEFIT PENSION PLAN

Plan Sponsor:

Plan Administrator:

Plan Contact:

Note: The information displayed here is the most up-to-date information that PBGC has on record for this plan. For instructions on how to update this information (outside the premium filing process) call the PBGC Contact Center at 1-800-736-2444. TTY/TDD users may call the Federal relay service at 1-800-877-8339 and ask to be connected.

Account History

Premium Filings and Payments Received by PBGC

To view the plan's Account History, ask the Filing Coordinator to add the View Account History permission to your account.

[About Account Histories](#)

Premium Filings for the Plan

[Instructions](#)

Create a Filing

☐ In-process ☐ Submitted ☒ All filings

Filing	Confirmation #	Filing Method	Received Date	Status
2018 Comprehensive		Screen Prepared	10/11/2018 5:15:17 PM	Submitted/Successfully Processed



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➤ Status of Submitted CSEC Filing:

- ❖ From the Plan Page, in the Quick Links bar, select "Check Status of Request."

Submit a Request: CSEC Filing

➤ Status of Submitted CSEC Filing:

- ❖ The page displays the status of the request(s) created via the “Submit a Request” Quick Link in addition to other relevant items which may have been created internally by the PBGC.
- ❖ Select the appropriate link to logout of My PAA or to go to another page (e.g., the Plan Page).



Check Status of Request

[Instructions](#)[Print this Page](#)

The chart below displays the detail of certain plan specific requests which the PBGC is tracking, created after 12/31/2017. The chart includes all requests that filing team members created via the “Submit a Request” Quick Link in addition to other relevant items which may have been created internally by the PBGC. It is common for plans to not have any requests listed on this page. Generally, any items with a “Complete” status should have an associated letter available in the “Plan Correspondence” Quick Link. If you have any questions about any of the data displayed, please send an email to premiums@pbgc.gov or call us at 1-800-736-2444 (select option “2” for premiums) and be sure to reference the Request ID noted in the chart. Referencing the Request ID will make it easier for the Premium Customer Service representative to identify the request.

Note: Please see the *Instructions* link above for additional details related to the “Pending Action per Plan Request” SR Type.

Plan Name: INC DEFINED BENEFIT PENSION PLAN

EIN/PN:

Request ID	Date Opened	Request Type	Status	Date Closed
647383	01/07/2020	Submitted CSEC Filing	Pending Review	
638139	09/16/2019	Contacted PBGC - Other	Logged & Completed	09/19/2019

Submit a Request: CSEC Filing



Plan Page

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Quick Links

Premium Filings

Plan Practitioners

Plan Correspondence

Submit a Request

Check Status of Request

Plan Information

DEFINED BENEFIT PENSION PLAN -

Plan Sponsor:

Plan Administrator:

Plan Contact:

Note: The information displayed here is the most up-to-date information that PBGC has on record for this plan. For instructions on how to update this information (outside the premium filing process) call the PBGC Contact Center at 1-800-736-2444. TTY/TDD users may call the Federal relay service at 1-800-877-8339 and ask to be connected.

Account History

Premium Filings and Payments Received by PBGC

To view the plan's Account History, ask the Filing Coordinator to add the View Account History permission to your account.

[About Account Histories](#)

Premium Filings for the Plan

[Instructions](#)

Create a Filing



In-process



Submitted



All filings

Filing	Confirmation #	Filing Method	Received Date	Status
2018 Comprehensive		Screen Prepared	10/11/2018 5:15:17 PM	Submitted/Successfully Processed



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➤ Access the image of the Submitted CSEC Filing:

- ❖ From the Plan Page, in the Quick Links bar, select "Check Status of Request."

Submit a Request: CSEC Filing

➤ Plan Correspondence Page:

- ❖ All notices that have been sent from the PBGC or attached via the “Submit a Request” Quick Link will appear on this page.
- ❖ The CSEC Filing will be labeled as “Form1” since PBGC is treating this as a paper filing.
- ❖ To ensure you are reviewing the correct document, you can verify the “Entry Date,” which is the date of submission.
- ❖ To review the CSEC Filing click on the corresponding UID link, and a copy of the document will appear in a new window.



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Plan Correspondence

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This page displays the premium correspondence that was/will be mailed to the plan administrator who was identified on the related premium filing. To assist with providing a timely response, the plan's e-filing team members who have the plan in their accounts can view the correspondence by selecting the link in the UID column. For more details, click the instructions link (on the right side of the page).

Plan ID:

Item #	Document Type	Entry Date	UID	EIN	PN
1	Financial Correspondence	01/08/2020	CR20200108900000200210		
2	PDFN Response	01/07/2020	SR20200107006473970190		
3	Form1	01/07/2020	SR20200107006473850103		
4	Other Notice	12/27/2019	LG19122501577314945269		
5	Error Notice	09/12/2019	LG19082501566705840554		
6	Error Notice	07/15/2019	LG19071001562792072763		
7	Financial Correspondence	06/24/2019	CR20190624900000100210		
8	Error Notice	03/23/2018	LG18032201521740291273		