

My Plan Administration Account (My PAA) Submit Other Request & Correspondence



Submit Other Request & Correspondence:

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)



[Forgot your User ID?](#) [Forgot your Password?](#)

[New users click here to sign up.](#)

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Submit a Request: Penalty RFR or Refund

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

Submit Other Request & Correspondence:

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.

PBGC My PAA v 15.1.0.26
Welcome, Jack Black! My Account Logout

LAUNCH PAGE HOME PLANS FILINGS HELP DEMOS

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

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)

Submit Other Request & Correspondence:

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.

The screenshot displays the PBGC website interface for 'All Plans in Jack Black's Account'. At the top, a navigation bar includes 'LAUNCH PAGE', 'HOME', 'PLANS', 'FILINGS', 'HELP', 'DEMOS', 'My Account', and 'Logout'. Below the navigation bar, the page title is 'All Plans in Jack Black's Account' with links for 'Instructions' and 'Print this page'.

The 'Active Plans' section features a search bar, 'Search', and 'Clear Search' buttons. Below the search bar are buttons for 'Invite Practitioner', 'Remove Practitioner', and 'Move to Archived Plans'. A table lists four retirement plans with columns for Plan Name, EIN/PN, Actions, and View Account History. Red arrows point to the search bar, the 'Move to Archived Plans' button, and the checkbox for Retirement Plan 4.

The 'Archived Plans' section also features a search bar, 'Search', and 'Clear Search' buttons, and a 'Move to Active Plans' button. A table lists four retirement plans with columns for Plan Name, EIN/PN, Actions, and View Account History. Red arrows point to the search bar, the 'Move to Active Plans' button, and the checkbox for Retirement Plan 8.

Plan Name	EIN/PN	Actions	View Account History
Retirement Plan 1	10-4104104 / 001	Create a Filing	Account History
Retirement Plan 2	44-4555222 / 001	Create a Filing	Account History
Retirement Plan 3	44-4777888 / 001	Create a Filing	Account History
Retirement Plan 4	55-6666666 / 777	Create a Filing	Account History

Plan Name	EIN/PN	Actions	View Account History
Retirement Plan 5	10-2102102 / 001	Create a Filing	Account History
Retirement Plan 6	65-0425084 / 002	Create a Filing	Account History
Retirement Plan 7	10-3103103 / 001	Create a Filing	Account History
Retirement Plan 8	74-2980802 / 231	Create a Filing	Account History

Submit Other Request & Correspondence:

Plan Page

➤ Quick Links:

- ❖ Select the Quick Link for “Submit a Request”.

Select one of the following links:

- ❖ The “Other Request & Correspondence” link to submit the following requests and correspondence:
 - 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



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** (Dropdown: Penalty RFR, Premium Refund (PA/PA Rep Only), Other Requests & Correspondence)
- Check Status of Request

Plan Information

Retirement Plan 4 – 55-6666666 / 001

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](#)

Submit Other Request & Correspondence:

- Other Request and Correspondence:
 - ❖ Select the request type (e.g., Response to 'Statement of Account').
 - ❖ Select and upload a PDF document if desired, not to exceed 15MB or enter any Comments, not to exceed 1,800 characters.
 - ❖ Select the "Next" button to go to the Summary Page.

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 of 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: 421201924 PN: 002

Request Type:

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

Please select and upload any additional information related to Other Requests can be found by clicking on the "Additional Information" link above.

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 Other Request & Correspondence:

➤ Other Request and Correspondence:

- ❖ 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 Other request/ Correspondence 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 Home Page).

PBGC My PAA

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

Other Requests and Correspondence Summary

EIN:	123456789
PN:	001
Request Type:	Lookback Rule Request
Attachment:	N/A
Comments:	Lookback rule request

< Back Cancel **Submit**

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Confirmation

[Print this Page](#)

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

SR#: 564259
EIN/PN: 123456789/001

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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