How to Add/Remove and Update Roles for a User in My PAA

My Plan Administration Account (My PAA)

Last Updated: July 30, 2024
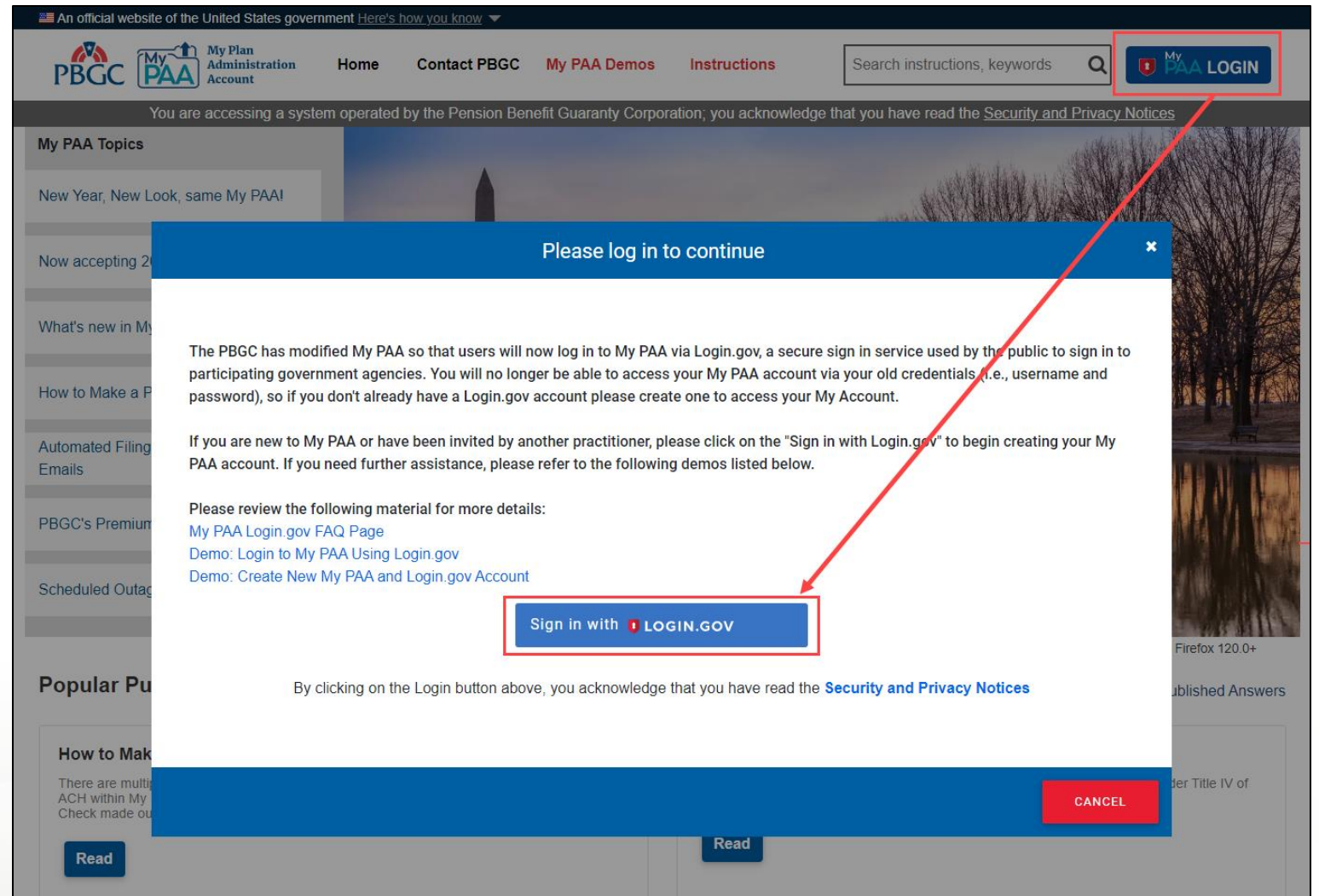
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Step-by-Step Instructions

Login

- From the Home Page, click on the "My PAA Login" button to log in.
- You will need to log in to your Login.gov account to access your My PAA account.
  - For more details and step-by-step instructions on how to access your My PAA account via Login.gov please view PBGC's How to Log in to My PAA Using Login.gov? Published Answer.

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How to Add, Remove and/or Update Roles for a User

Plan List Page

- Once you have logged in, click on the "Plan List" button from the Home Page.

- From the Plan List Page click on the Plan Name link for the plan you are currently assigned the Filing Coordinator role for, so that you can add/edit a team member.

How to Add, Remove and/or Update Roles for a User

Plan Details & Role Management Pages

- From the Plan Details Page, click on the "Manage Roles" button in the Team Members section.
    - Please note that you may only add/remove filing team members or update the roles of filing team members as a Filing Coordinator

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Role Management Page

View Active/Inactive Filing Members

- A list of all active filing members associated with this plan will be displayed (this is the default view) on the Manage Plan Roles Page.

- You can view all associated filing members, including inactive members, by changing the "Filter" dropdown to "All."

- Once the appropriate filter has been selected, click the "Next" button.

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Role Management Page

View Active/Inactive Filing Members

- Active filing members have at least one role associated with their account for the corresponding plan (i.e., one "Yes" radio button is selected).

- Inactive filing members do not have any roles associated with their account for the corresponding plan (i.e., the "No" radio button is selected for all roles.

   *Note: Inactive Practitioners will no longer be associated with the Plan and will not receive any sort of email/notification from PBGC relating to the particular plan.

Role Management
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✏ Manage Plan Roles

Manage Plan Roles

What would you like to do?

Manage Team Member roles for this plan ▼

Plan Name: MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN
EIN/PN: 131311313 / 121

Note: The current team members for this plan and their assigned roles are displayed below. To update the roles for an existing team member, select the 'Update Roles' checkbox within their row and then modify the Yes/No values in each Role column as needed. Identify whether you would like to add an additional team member via the question appearing after the list of team members. If you indicate that you wish to add a new team member, when you select 'Next' you will be prompted to input the new team member's information on the following page.

Filter:

All ▼

Name	Update Roles	Filing Coordina...	Plan Admin	Plan Admin Rep	Actuary	Filing Preparer	Payment Preparer	Upload Preparer	Disabled?
JOE WHI	☐	● Yes / No	Yes / ● No	● Yes / No	● Yes / No	● Yes / No	● Yes / No	● Yes / No	Yes / ● No
First Last Name	☐	● Yes / No	Yes / ● No	● Yes / No	● Yes / No	● Yes / No	● Yes / No	● Yes / No	Yes / ● No
JANE DOE	☐	● Yes / No	● Yes / No	Yes / ● No	● Yes / No	● Yes / No	● Yes / No	● Yes / No	Yes / ● No
*inactive → VAL I	☐	Yes / ● No	Yes / ● No	Yes / ● No	Yes / ● No	Yes / ● No	Yes / ● No	Yes / ● No	Yes / ● No
Jane Smith	☐	● Yes / No	● Yes / No	Yes / ● No	● Yes / No	● Yes / No	● Yes / No	● Yes / No	Yes / ● No

Do you want to add a new team member?

○ Yes
● No

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How to Add, Remove and/or Update Roles for a User

Role Management Page

Add a New Filing Member

- To add a new filing member, select the "Yes" radio button to the question, "Do you want to add a new team member?" and click the "Next" button.

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Role Management Page

Add a New Filing Member

- Enter the First Name, Last Name, and Email Address of the member you want to add to the plan, and then click the "Next" button.

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Role Management Page

Add a New Filing Member

- If you arrive to this page and know that the filing team member you wish to add to the plan already has a My PAA account, click on the "Back" button and ensure you have entered the correct First Name, Last Name, and Email Address that is associated with their My PAA account. Then skip to slide 11.

- If the filing team member does not have a My PAA account you can get the process started for them by selecting the "Yes" radio button, and then clicking the "Next" button.

- If the filing team member does not have a My PAA account and you do not wish to start the process of creating their My PAA account, select the "No" radio button and click the "Next" button to exit the process.

Add New Team Member

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✔ Manage Plan Roles

✎ New Practitioner Information

New Practitioner Information

Plan Name: MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN
EIN/PN: 131311313 / 121

The Name and Email Address provided do not match an existing My PAA account. If you would like to create a new My PAA account for Testing Contact, click Yes below, populate the requested data about the new team member, and select Next. Upon submission an email will be sent to mypaa.testing@pbgc.gov providing them instructions on how to access their new online account. If you believe you have entered incorrect information about the new team member, select Back to make any needed updates or select No and Next to exit this process.

⚠️

○ Yes
○ No

Back

Next

Exit

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Role Management Page

Add a New Filing Member

- If the filing team member does not have a My PAA account and you choose to start the process of creating an account for them, provide their office phone number and extension (if applicable), then click the "Next" button.

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Role Management Page

Add a New Filing Member

- Assign the appropriate roles to the new filing team member by selecting the "Yes" radio button for the corresponding role.
- If you do not wish to grant the new filing team member with a specific role, select the "No" radio button for the corresponding role.
  - Please ensure every role is answered with either "Yes" or "No," then click the "Submit" button.
- Once the request has been submitted, the new filing team member will receive an automated email (to the email address you provided) from My PAA with additional instructions on how to complete their account creation.

Role Management Page

Add a New Filing Member

- After submitting the request for the addition of the new filing team member, return to the Manage Plan Roles Page to view the update.

Role Management Page

Removing a Filing Team Member/Plan from your My PAA Account

- If you want to inactivate a filing team member or remove a plan from your account, remove all associated roles:
  - Check the "Update Roles" checkbox for the corresponding filing team member.
  - Select the "No" radio button for all listed roles.
- This action will trigger a warning indicating that this will inactivate the filing team member from the plan.
- Click the "Next" button if you wish to continue with the action
- Click the "Cancel" button if you wish to keep the filing team member associated with the plan and keep all their corresponding roles the same.
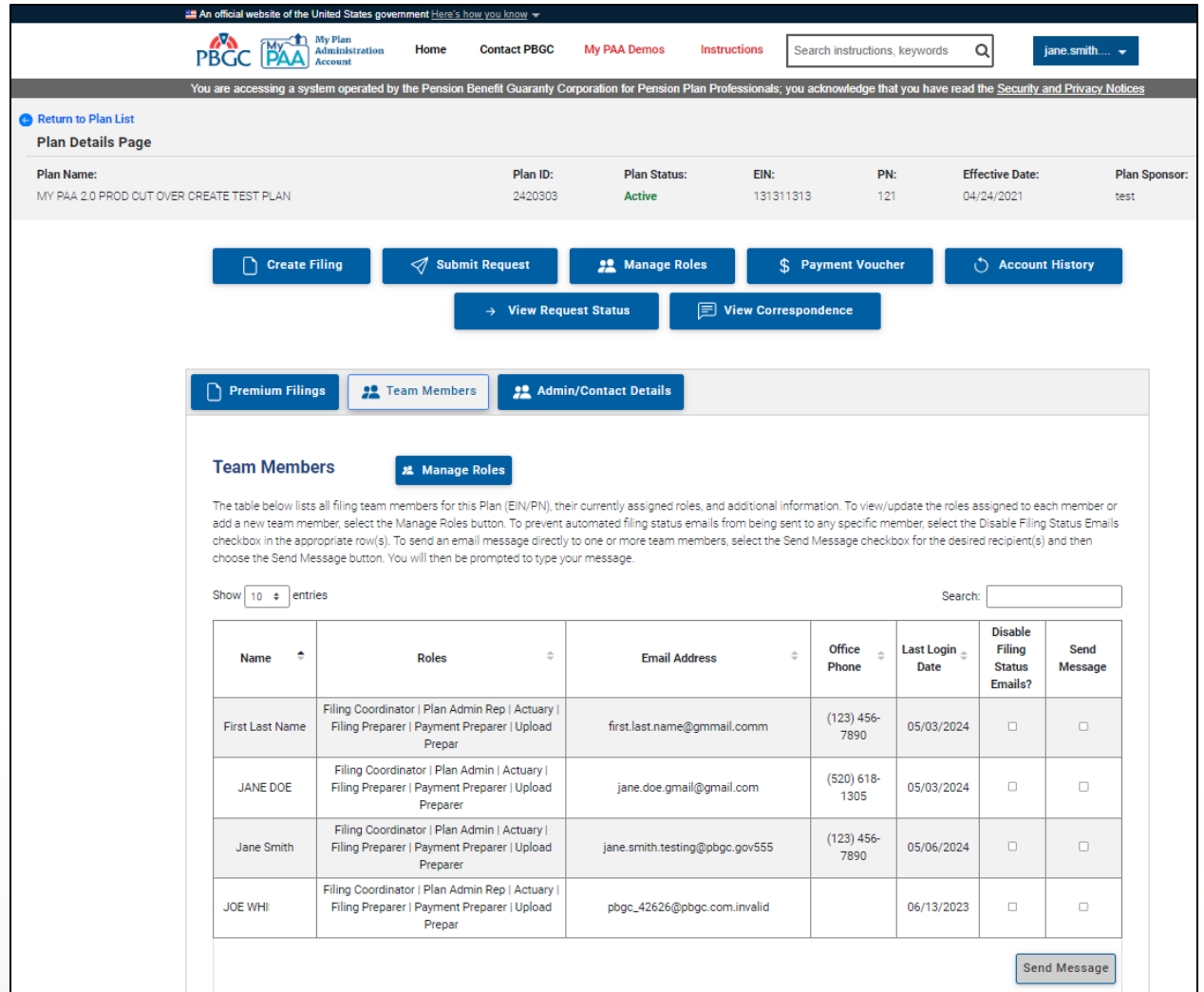
How to Add, Remove and/or Update Roles for a User

Role Management Page

Removing a Filing Member

- After submitting the request to remove the filing team member from the plan, return to the Manage Plan Roles Page to view the update.
  - Reminder: You will still be able to view all previously associated practitioners by changing the filter to "All," which will include all inactive filing team members.
- If you are removing yourself from a plan, once you set all the radio buttons to "No" and click the "Next" button, you will no longer be affiliated with the plan and you will not be able view any plan information via My PAA.

How to Add, Remove and/or Update Roles for a User

Role Management Page

Update Filing Roles

- If you wish to update the roles of an active filing team member, simply click the "Update Roles" checkbox, and then assign the appropriate roles to the filing team member by selecting the "Yes" radio button for the corresponding role.

- If you wish to remove a role from a specific filing team member, select the "No" radio button for the corresponding role.

- Please ensure every role is answered with either a "Yes" or "No," then click the "Next" button.

- You may edit the roles for multiple team members at one time by clicking the "Update Roles" checkbox for everyone you'd like to update.

Role Management Page

Update Filing Roles

- After submitting the request to update the roles of the filing team member(s) you will be redirected to the Plan Details page, where you can see the updates in the Team Members section.

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