

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

My Plan Administration Account (My PAA)

Last Updated: July 30, 2024





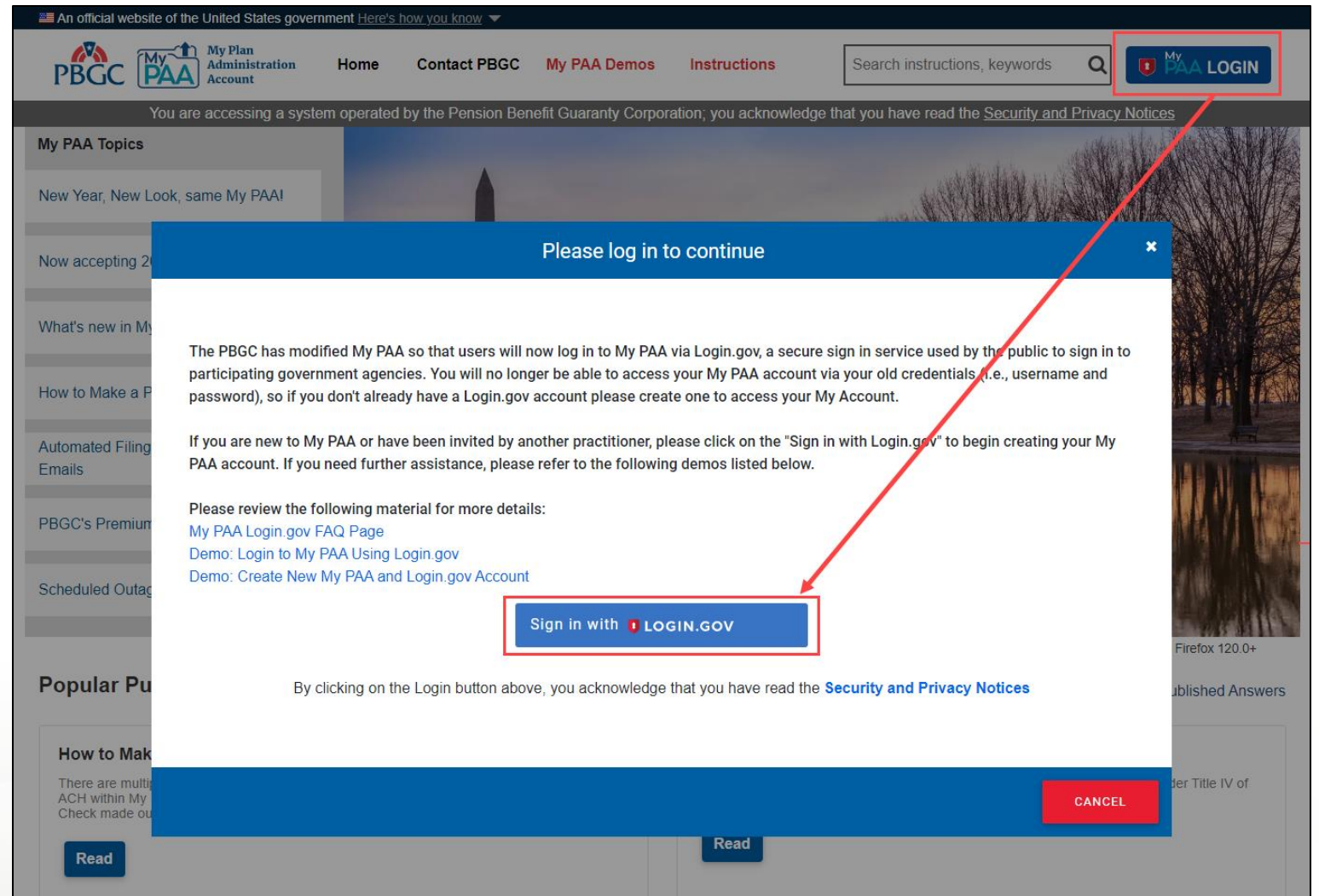
Step-by-Step Instructions

PBGC

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

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.



The screenshot shows the My PAA Login page. At the top right, there is a "My PAA LOGIN" button highlighted with a red box. A red arrow points from this button to a modal window titled "Please log in to continue". The modal contains the following text:

The PBGC has modified My PAA so that users will now log in to My PAA via Login.gov, a secure sign in service used by the public to sign in to participating government agencies. You will no longer be able to access your My PAA account via your old credentials (i.e., username and password), so if you don't already have a Login.gov account please create one to access your My Account.

If you are new to My PAA or have been invited by another practitioner, please click on the "Sign in with Login.gov" to begin creating your My PAA account. If you need further assistance, please refer to the following demos listed below.

Please review the following material for more details:

- [My PAA Login.gov FAQ Page](#)
- [Demo: Login to My PAA Using Login.gov](#)
- [Demo: Create New My PAA and Login.gov Account](#)

At the bottom of the modal, there is a "Sign in with LOGIN.GOV" button highlighted with a red box. Below the modal, there is a "CANCEL" button and a "Read" button.

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.

An official website of the United States government Here's how you know

PBGC My PAA My Plan Administration Account Home Contact PBGC My PAA Demos Instructions Search instructions, keywords

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge that you have read the Security and Privacy Notices

New Year, New Look, same My PAA! PBGC is redesigning My PAA starting with the Home Page and Filing Details Page, see the details [here](#).

My PAA Topics

- New Year, New Look, same My PAA!
- Now accepting 2024 Filings
- What's new in My PAA & Login Process
- How to Make a Payment?

Create New / Add Existing Plan

Plan List

In-Process Filings

Load or Import Filings

Upload History

Microsoft Edge 124.0+, Firefox 125.0+

Search All Published Answers

and Plan Administrators. If you

Plans in your My PAA Account

The below list consists of all of your Plans. You can use the Create New Filing column buttons to create new filings based on your Role. You can use the Latest Filing Status column buttons to complete the next step for each Filing based on your Role(s). Use the Links in the Filing ID and Plan Name columns to see its corresponding details page.

Filter by Latest Filing Status

Show 10 entries Search:

Create New Filing	Plan ID	EIN	PN	Plan Name	Latest Filing Update	Latest Filing ID	Latest PVC	Latest Filing Status
	2420303	131311313	121	MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN UPDATE	07/26/2024	539331		Draft
	86264	123456789	001	SPECIAL NON-PREMIUM TRANSACTIONS	06/05/2024	500753	01/01/2022	Submitted
	2420311	898989898	898	PRACTITIONER REMOVED FROM ANOTHER PLAN	11/01/2023	506658	01/01/2023	Draft

Showing 1 to 3 of 3 entries

First 1 Last

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

The screenshot displays the PBGC My PAA interface. At the top, it identifies the user as a Pension Plan Professional and provides a link to the Security and Privacy Notices. The main content area is divided into two sections: Plan Details and Role Management.

Plan Details Page:

- Plan Name: MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN UPDATE
- Plan ID: 2420303
- Plan Status: Active
- EIN: 13131

Role Management Page:

- Published: 01/19/2020 04:17 PM | Updated: 04/27/2021 04:07 PM
- Manage Plan Roles button
- Dropdown menu options:
 - Manage Team Member roles for this plan
 - Add a single user to multiple plans

Team Members Section:

The table below lists all filing team members for this Plan (EIN/PN), their currently assigned roles, and additional information. To view/update the roles assigned to each member or add a new team member, select the Manage Roles button. To prevent automated filing status emails from being sent to any specific member, select the Disable Filing Status Emails checkbox in the appropriate row(s). To send an email message directly to one or more team members, select the Send Message checkbox for the desired recipient(s) and then choose the Send Message button. You will then be prompted to type your message.

Show 10 entries Search: []

Name	Roles	Email Address	Office Phone	Last Login Date	Disable Filing Status Emails?	Send Message
Jane Doe	Filing Coordinator Plan Admin Actuary Filing Preparer Payment Preparer	jane.doe.smith@pbgc.gov	(123) 456-7890	05/03/2024	<input type="checkbox"/>	<input type="checkbox"/>

Send Message button

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

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.

The screenshot shows the PBGC Role Management interface. At the top, there are navigation links: Home Page, Contact PBGC, My PAA Demos, and Instructions. A search bar is present with the text "Search My PAA for instructions, keywords or topics". The user's name "jane.smith.t..." is visible in the top right.

Role Management

Published 01/19/2020 04:17 PM | Updated 04/27/2021 04:07 PM

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: Currently Active

		Filing Coordina...	Plan Admin	Plan Admin Rep	Actuary	Filing Preparer	Payment Preparer	Upload Preparer	Disabled?
JOE WHI	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
First Last Name	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
JANE DOE	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
VAL	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Jane Smith	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

Do you want to add a new team member?
 Yes
 No

Cancel Next

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

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

Published 01/19/2020 04:17 PM | Updated 04/27/2021 04:07 PM

[Manage Plan Roles](#) **Manage Plan Roles**

What would you like to do?

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:

Name	Update Roles	Filing Coordina...	Plan Admin	Plan Admin Rep	Actuary	Filing Preparer	Payment Preparer	Upload Preparer	Disabled?
<input type="text" value="JOE WHI"/>	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="text" value="First Last Name"/>	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="text" value="JANE DOE"/>	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="text" value="VAL I"/>	<input type="checkbox"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="text" value="Jane Smith"/>	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

***inactive** →

Do you want to add a new team member?
 Yes
 No

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.

The screenshot shows the PBGC Role Management interface. At the top, there are navigation links: Home Page, Contact PBGC, My PAA Demos, and Instructions. A search bar is on the right with the text 'Search My PAA for instructions, keywords or topics' and a user profile 'jane.smith.t...'. The main heading is 'Role Management' with a sub-heading 'Manage Plan Roles'. Below this, there is a dropdown menu for 'What would you like to do?' set to 'Manage Team Member roles for this plan'. The plan name is 'MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN' and the EIN/PN is '131311313 / 121'. A note explains that the current team members and their roles are displayed below, and users can update roles or add new members. A filter dropdown is set to 'Currently Active'. The main table lists team members with columns for Name, Update Roles, Filing Coordination, Plan Admin, Plan Admin Rep, Actuary, Filing Preparer, Payment Preparer, Upload Preparer, and Disabled?. The 'Next' button is highlighted with a red box.

Name	Update Roles	Filing Coordina...	Plan Admin	Plan Admin Rep	Actuary	Filing Preparer	Payment Preparer	Upload Preparer	Disabled?
JOE WHI	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
First Last Name	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
JANE DOE	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Jane Smith	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

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

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.

Add New Team Member

Published 01/20/2020 11:32 PM | Updated 04/27/2021 04:07 PM

[Manage Plan Roles](#)

Manage Plan Roles

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

New Team Member Information

First Name **Last Name**

Email Address

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

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


Published 01/20/2020 11:32 PM | Updated 04/27/2021 04:07 PM

- ✓ 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](#)

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

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.

Add New Team Member

Published 01/20/2020 11:32 PM | Updated 04/27/2021 04:07 PM

- ✓ 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

Email Address:

First Name:

Last Name:

Office Phone:

Extension:

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

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.

Add New Team Member

Published 01/20/2020 11:32 PM | Updated 04/27/2021 04:07 PM

- ✓ Manage Plan Roles
- ✓ New Practitioner Information
- ✎ New Team Member**

New Team Member

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

Name	Filing Coordina...	Plan Admin	Plan Admin Rep	Actuary	Filing Preparer	Payment Preparer	Upload Preparer
<input type="text" value="Testing Contact"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No

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

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.

Add New Team Member

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- ✓ Manage Plan Roles
- ✓ New Practitioner Information
- ✓ New Team Member
- ✎ Interview Complete**

Interview Complete

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

This account has been successfully created. An automated email has been sent to the provided email address containing instructions for them to access their newly created My PAA account.

Please return to the [Manage Roles](#) page to make any further changes to your filing team.

[Back to Plan List](#)

[Exit](#)

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

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.

Role Management

Published 01/19/2020 04:17 PM | Updated 04/27/2021 04:07 PM

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: Currently Active

Name	Update Roles	Filing Coordina...	Plan Admin	Plan Admin Rep	Actuary	Filing Preparer	Payment Preparer	Upload Preparer	Disabled?
JOE WHI:	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
First Last Name	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
JANE DOE	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Jane Smith	<input type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
TESTING CONTACT	<input checked="" type="checkbox"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

You are about to inactivate TESTING CONTACT from the plan. If this is in error, please add at least one permission to the team member above.

Do you want to add a new team member?

Yes
 No

Next

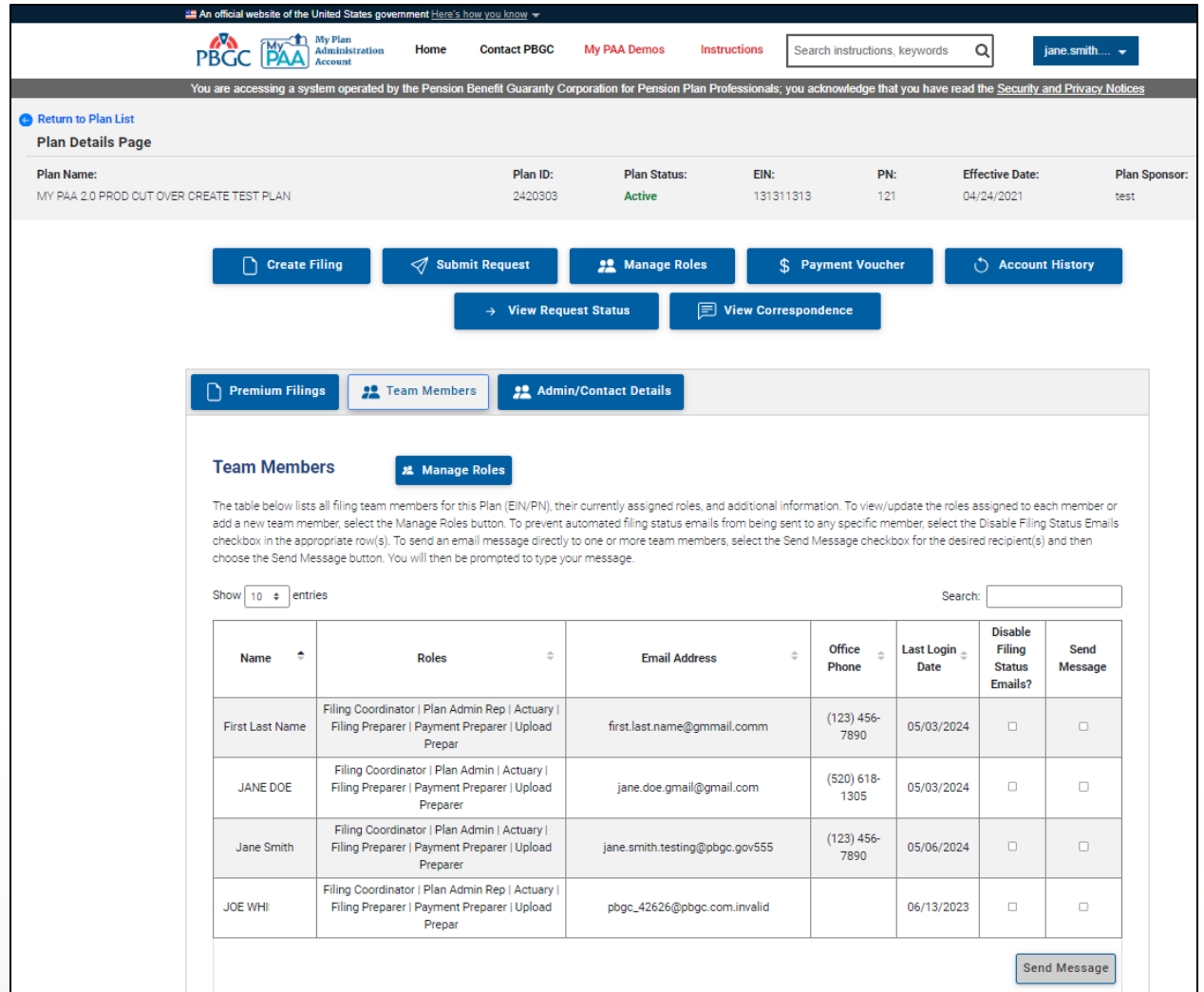
Cancel

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.



The screenshot displays the 'Plan Details Page' for 'MY PAA 2.0 PROD OUT OVER CREATE TEST PLAN'. It includes a navigation bar with 'Manage Roles' and a 'Team Members' tab. Below the tab is a table of team members with columns for Name, Roles, Email Address, Office Phone, Last Login Date, Disable Filing Status Emails?, and Send Message.

Name	Roles	Email Address	Office Phone	Last Login Date	Disable Filing Status Emails?	Send Message
First Last Name	Filing Coordinator Plan Admin Rep Actuary Filing Preparer Payment Preparer Upload Preparer	first.last.name@gmail.com	(123) 456-7890	05/03/2024	<input type="checkbox"/>	<input type="checkbox"/>
JANE DOE	Filing Coordinator Plan Admin Actuary Filing Preparer Payment Preparer Upload Preparer	jane.doe.gmail@gmail.com	(520) 618-1305	05/03/2024	<input type="checkbox"/>	<input type="checkbox"/>
Jane Smith	Filing Coordinator Plan Admin Actuary Filing Preparer Payment Preparer Upload Preparer	jane.smith.testing@pbgc.gov555	(123) 456-7890	05/06/2024	<input type="checkbox"/>	<input type="checkbox"/>
JOE WHI	Filing Coordinator Plan Admin Rep Actuary Filing Preparer Payment Preparer Upload Preparer	pbgc_42626@pbgc.com.invalid		06/13/2023	<input type="checkbox"/>	<input type="checkbox"/>

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

Published 01/19/2020 04:17 PM | Updated 04/27/2021 04:07 PM

[Manage Plan Roles](#) **Manage Plan Roles**

What would you like to do?

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:

Name	Update Roles	Filing Coordina...	Plan Admin	Plan Admin Rep	Actuary	Filing Preparer	Payment Preparer	Upload Preparer	Disabled?
JOE WHI	<input type="checkbox"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
First Last Name	<input type="checkbox"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
JANE DOE	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Jane Smith	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

Do you want to add a new team member?
 Yes
 No

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

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.

The screenshot shows the 'Plan Details Page' for 'MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN'. The page includes a navigation bar with 'Home', 'Contact PBGC', 'My PAA Demos', and 'Instructions'. Below the navigation bar, there are buttons for 'Create Filing', 'Submit Request', 'Manage Roles', 'Payment Voucher', and 'Account History'. The 'Team Members' section is highlighted, showing a table of filing team members. The table has columns for Name, Roles, Email Address, Office Phone, Last Login Date, Disable Filing Status Emails?, and Send Message. The table contains four rows of data, with the first row being a placeholder and the other three representing specific team members: JANE DOE, Jane Smith, and JOE WHI.

Name	Roles	Email Address	Office Phone	Last Login Date	Disable Filing Status Emails?	Send Message
First Last Name	Filing Coordinator Plan Admin Rep Actuary Filing Preparer Payment Preparer Upload Preparer	first.last.name@gmail.com	(123) 456-7890	05/03/2024	<input type="checkbox"/>	<input type="checkbox"/>
JANE DOE	Filing Coordinator Plan Admin Actuary Filing Preparer Payment Preparer Upload Preparer	jane.doe.gmail@gmail.com	(520) 618-1305	05/03/2024	<input type="checkbox"/>	<input type="checkbox"/>
Jane Smith	Filing Coordinator Plan Admin Actuary Filing Preparer Payment Preparer Upload Preparer	jane.smith.testing@pbgc.gov555	(123) 456-7890	05/06/2024	<input type="checkbox"/>	<input type="checkbox"/>
JOE WHI	Filing Coordinator Plan Admin Rep Actuary Filing Preparer Payment Preparer Upload Preparer	pbgc_42626@pbgc.com.invalid		06/13/2023	<input type="checkbox"/>	<input type="checkbox"/>