

How to Create a New Plan and Add Existing Plan to Your Account

My Plan Administration Account (My PAA)

Last Updated: May 06, 2024





Step-by-Step Instructions

PBGC

How to Create a New Plan and Add Existing Plan to Your Account

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 modal dialog is open in the center, titled "Please log in to continue". The dialog 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 dialog is a button labeled "Sign in with LOGIN.GOV". A green arrow points from this button to the "My PAA LOGIN" button in the top right corner of the page. Below the dialog, there is a "CANCEL" button and a "By clicking on the Login button above, you acknowledge that you have read the Security and Privacy Notices" message.

How to Create a New Plan and Add Existing Plan to Your Account

Create New / Add Existing Plan

- Once you have logged in to your My PAA account, click on the “Create New / Add Existing Plan” button from the Home Page.

The screenshot shows the My PAA account home page. At the top, there is a navigation bar with the PBGC logo, 'My PAA My Plan Administration Account', and links for Home, Contact PBGC, My PAA Demos, and Instructions. A search bar and a user profile dropdown (jane.doe.sm...) are also present. Below the navigation bar, a red banner contains the text: '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](#).' The main content area features a large image of cherry blossoms over a body of water. On the left, there is a 'My PAA Topics' sidebar with links such as 'New Year, New Look, same My PAA!', 'Now accepting 2024 Filings', 'What's new in My PAA & Login Process', 'How to Make a Payment?', 'Automated Filing Status Transitions and Emails', 'PBGC's Premium Disaster Relief Policy', and 'Scheduled Outages'. On the right, a vertical menu of blue buttons is displayed: 'Create New / Add Existing Plan' (highlighted with a red box and a red arrow), 'Plan List', 'In-Process Filings', 'Upload or Import Filings', and 'View Upload History'. At the bottom of the page, there is a footer with the text: 'Supported Browsers: Google Chrome 124.0+, Microsoft Edge 124.0+, Firefox 125.0+ (Release 5.7 as of 04/21/2024)'.

How to Create a New Plan and Add Existing Plan to Your Account

Create New Plan / Add Existing Plan Page


- Once you have logged in, click on the "Create New Plan / Add Existing Plan" icon or link from the Home Page and you will be redirected to the "New Plan/Add Existing Plan Information" Page.

New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Information

General Plan Information

Employer Identification Number (EIN):  Plan Number (PN):

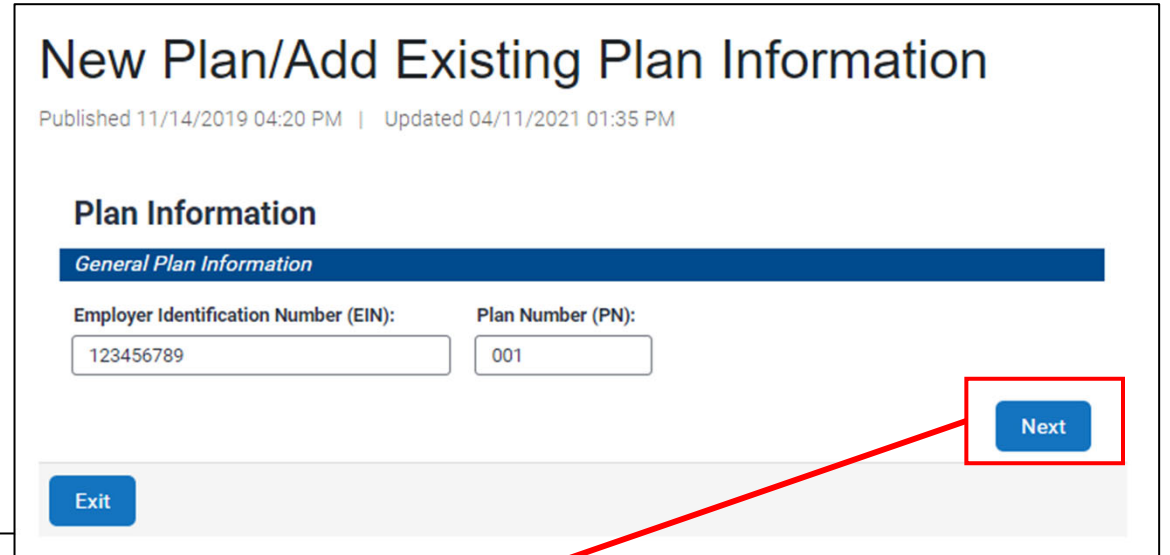
[Next](#)

[Exit](#)

How to Create a New Plan and Add Existing Plan to Your Account

Add a New Plan

- Enter the 9-digit Employer Identification Number (EIN), and the 3-digit Plan Number (PN) for the new plan. Then click “Next.”
- You will be directed to a Summary Page to confirm the EIN/PN you entered on the previous screen. Click “Next” to continue adding the plan if the EIN/PN is correct. If the EIN/PN combination is incorrect, then click “Back” to return to the previous screen and update.



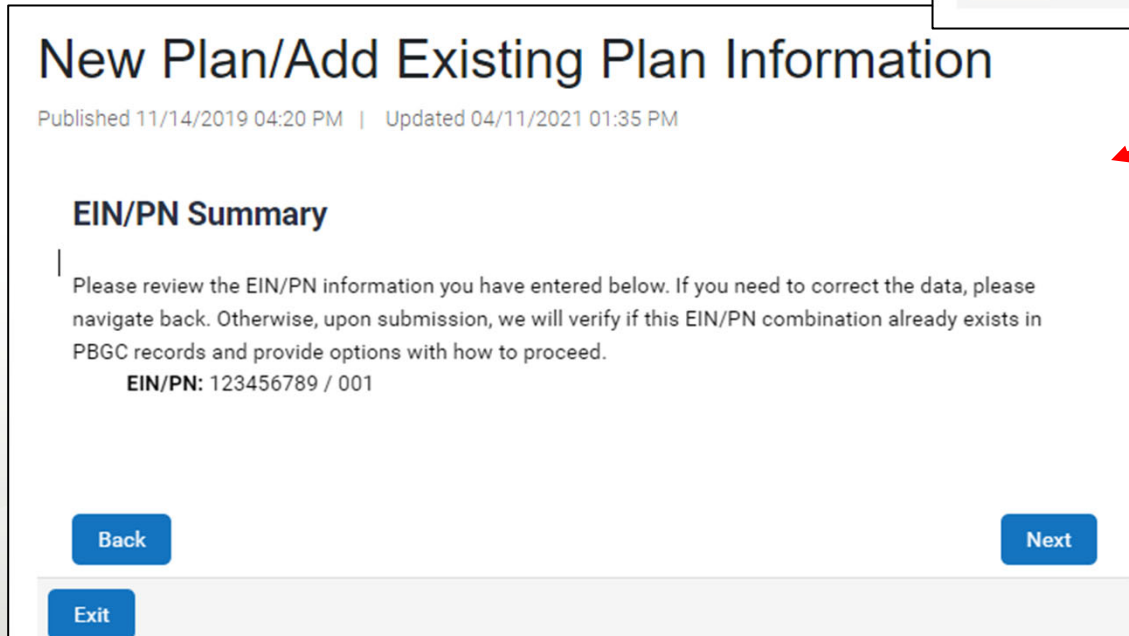
New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Information

General Plan Information

Employer Identification Number (EIN): Plan Number (PN):

[Exit](#) [Next](#)



New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

EIN/PN Summary

Please review the EIN/PN information you have entered below. If you need to correct the data, please navigate back. Otherwise, upon submission, we will verify if this EIN/PN combination already exists in PBGC records and provide options with how to proceed.

EIN/PN: 123456789 / 001

[Back](#) [Next](#)

[Exit](#)

How to Create a New Plan and Add Existing Plan to Your Account

New Plan/Add Existing Plan Information Page

Add a New Plan

- My PAA will confirm that the plan does not already exist in PBGC's records. Once that information is confirmed, please provide the General Plan Information and Plan Admin Information
- Required fields
 - Effective Date
 - Plan Name
 - Plan Admin Name, Email Address, Phone Number and Mailing Address
- Once the information has been provided and validated, click the "Next" button.

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

EIN/PN Summary

Please review the EIN/PN information you have entered below. If you need to correct the data, please navigate back. Otherwise, upon submission, we will verify if this EIN/PN combination already exists in PBGC records and provide options with how to proceed.

EIN/PN: 123123123 / 123

[Back](#) [Next](#) [Exit](#)

New Plan/Add Existing Plan Information
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EIN/PN Lookup Results

The EIN/PN combination you entered does not currently exist in PBGC records. If you believe that the EIN/PN combination you entered does exist in PBGC records, please click the "Exit" button and attempt this process again ensuring you are using the correct EIN/PN. If you still arrive at this message and believe it is an error, please click [here](#) for further assistance. Otherwise, you can proceed with creating a new Defined Benefit Pension Plan for the purposes of submitting annual Comprehensive Premium Filings with the PBGC.

General Plan Information

Effective Date:
Note: The Effective Date entered here will prepopulate as item 4(d) on the Comprehensive Premium Filing when submitting the first year filing in My PAA. You can edit the Effective Date at that time, but you will receive a warning and/or notice from the PBGC explaining the inconsistency, as PBGC records will need to be updated. Please confirm you are entering the correct date the Defined Benefit plan actually became effective. ⚠️

mm dd yyyy

Plan Name:

Plan Admin Information

Admin's Name:

's Email Address:

's Phone Number:

Address 1:

Address 2:

Country: City: State: Zip Code:
United States (US)

[Next](#) [Exit](#)

How to Create a New Plan and Add Existing Plan to Your Account

New Plan/Add Existing Plan Information Page

Add a New Plan

- Once the information has been provided and validated, click the “Next” button to complete the plan creation captcha and submit.

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

EIN/PN Lookup Results

The EIN/PN combination you entered does not currently exist in PBGC records. If you believe that the EIN/PN combination you entered does exist in PBGC records, please click the “Exit” button and attempt this process again ensuring you are using the correct EIN/PN. If you still arrive at this message and believe it is an error, please click [here](#), for further assistance. Otherwise, you can proceed with creating a new Defined Benefit Pension Plan for the purposes of submitting annual Comprehensive Premium Filings with the PBGC.

General Plan Information

Effective Date:

Note: The Effective Date entered here will prepopulate as item 4(d) on the Comprehensive Premium Filing when submitting the first year filing in My PAA. You can edit the Effective Date at that time, but you will receive a warning and/or notice from the PBGC explaining the inconsistency, as PBGC records will need to be updated. Please confirm you are entering the correct date the Defined Benefit plan actually became effective.

01 ▼ 01 ▼ 2023 ▼

Plan Name:
JS Testing Plan

Plan Admin Information

Admin's Name:
John Smith

John Smith's Email Address:
pbgyfz@gmail.com

John Smith's Phone Number:
(123) 456-7890

Address 1:
123 John st

Address 2:

Country: United States (US) ▼ City: Washington State: DC ▼ Zip Code: 20000

Next

Exit

New Plan/Add Existing Plan Information
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Plan Creation Captcha

Please enter the following text:

qq8byu

Back **Submit**

Exit

How to Create a New Plan and Add Existing Plan to Your Account

New Plan/Add Existing Plan Information Page

Add a New Plan

- Enter the Captcha text, and then click the “Submit” button.
- Once the plan has been created you will be redirected to the completion page, and My PAA will also send a confirmation email to the email address associated with your My PAA Account. The email will contain the plan’s Plan ID number.
- You will now be able to continue with any premium related action for the plan by clicking on the “Back to Plan List” button.

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Creation Captcha
Please enter the following text:

78te0h

78te0h

Back Submit Exit

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Creation Request Complete

You have successfully created a new Plan in My PAA with the details below. Since you are the first filing team member for this Plan, you are automatically assigned as the Plan's Filing Coordinator. This role allows you to add new members to the filing team and [manage their associated roles](#). This Plan should now be available in your "Plan List" from the Home Page, or by clicking the button below.

If you do not receive a confirmation email stating the Plan ID for this newly created Plan, please update the associated incident from the [Account Activity History](#).

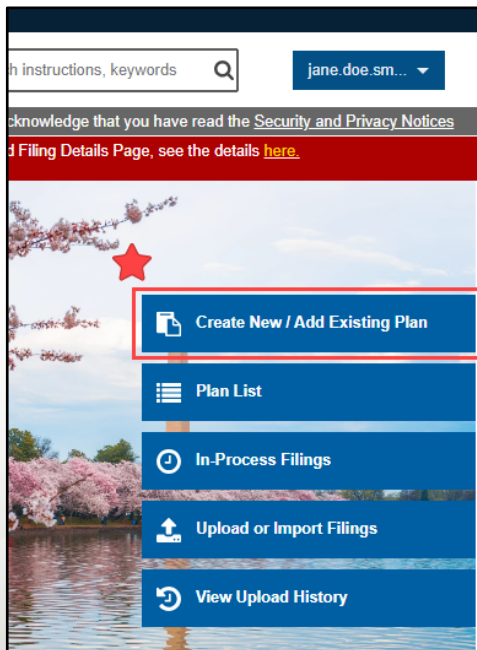
Plan Details:
Plan Name: JS Testting Plan
EIN/PN: 123456789/123
Effective Date: 01/01/2023

Back to Plans List Exit

How to Create a New Plan and Add Existing Plan to Your Account

Create New Plan / Add Existing Plan Page

- Once you have logged in, click on the "Create New Plan / Add Existing Plan" icon or link from the Home Page and you will be redirected to the "New Plan/Add Existing Plan Information" Page.




New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Information

General Plan Information

Employer Identification Number (EIN):  Plan Number (PN):

How to Create a New Plan and Add Existing Plan to Your Account

Create New Plan / Add Existing Plan Page

Add an Existing Plan

- Enter the 9-digit Employer Identification Number (EIN), and the 3-digit Plan Number (PN) for the plan. Then click “Next.”
- You will be directed to a Summary Page to confirm the EIN/PN you entered on the previous screen.

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Information

General Plan Information

Employer Identification Number (EIN): 123456789 Plan Number (PN): 001

Next

Exit

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

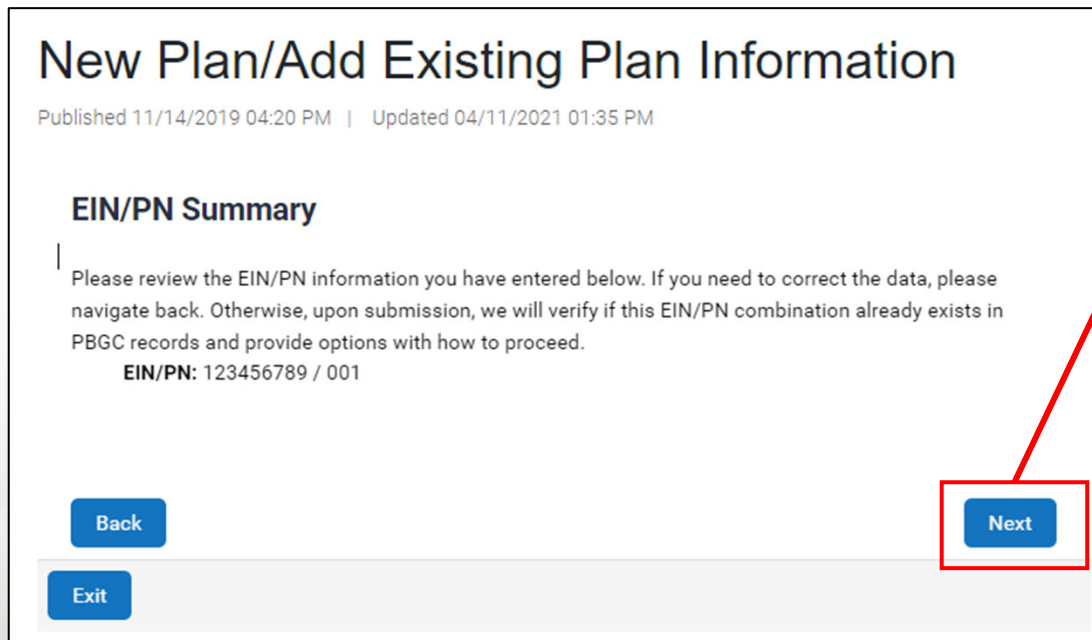
EIN/PN Summary

How to Create a New Plan and Add Existing Plan to Your Account

Create New Plan / Add Existing Plan Page

Add an Existing Plan

- On the Summary Page to confirm the EIN/PN you entered on the previous screen. Click “Next” to continue adding the plan if the EIN/PN is correct. If the EIN/PN combination is incorrect, then click “Back” to return to the previous screen and update.
- Once you have confirmed the EIN/PN combination, you will be directed to the EIN/PN Lookup Result page



New Plan/Add Existing Plan Information

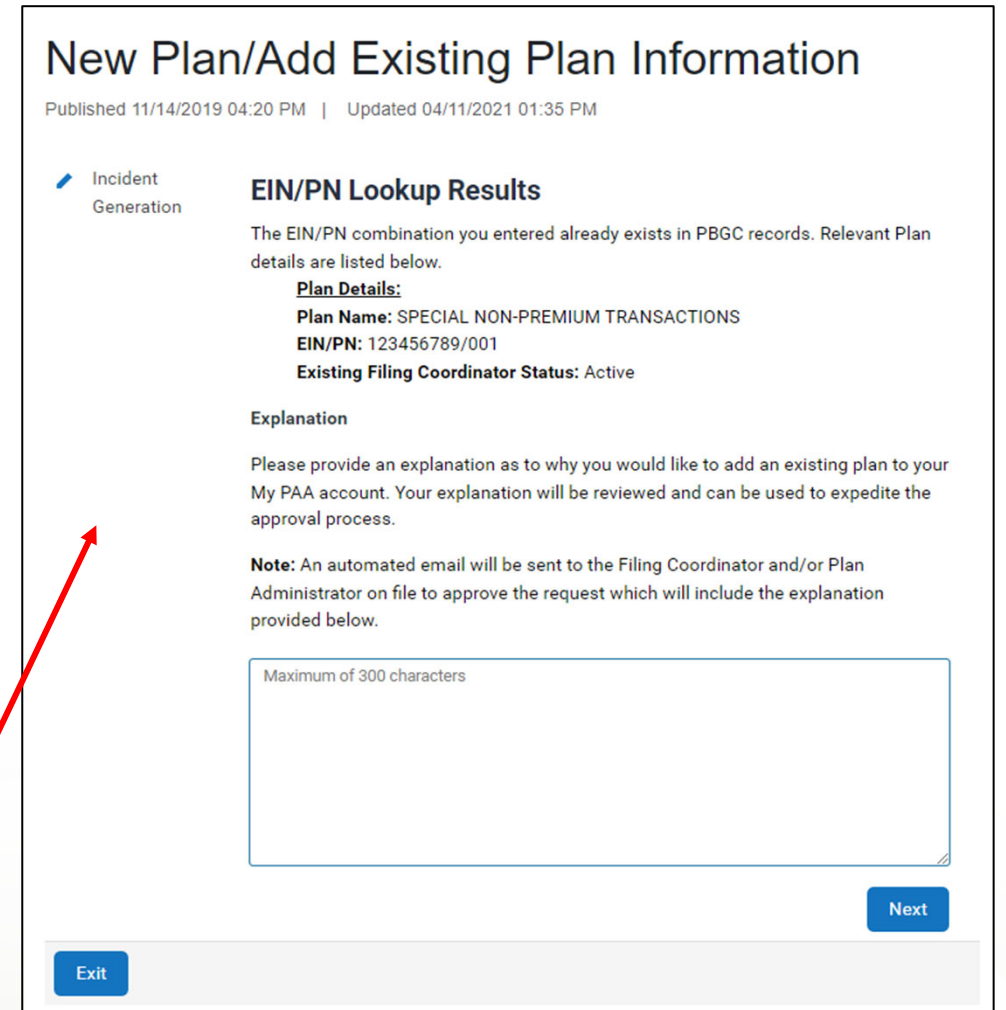
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

EIN/PN Summary

Please review the EIN/PN information you have entered below. If you need to correct the data, please navigate back. Otherwise, upon submission, we will verify if this EIN/PN combination already exists in PBGC records and provide options with how to proceed.

EIN/PN: 123456789 / 001

[Back](#) [Next](#) [Exit](#)



New Plan/Add Existing Plan Information

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[Incident Generation](#)

EIN/PN Lookup Results

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details are listed below.

Plan Details:
Plan Name: SPECIAL NON-PREMIUM TRANSACTIONS
EIN/PN: 123456789/001
Existing Filing Coordinator Status: Active

Explanation

Please provide an explanation as to why you would like to add an existing plan to your My PAA account. Your explanation will be reviewed and can be used to expedite the approval process.

Note: An automated email will be sent to the Filing Coordinator and/or Plan Administrator on file to approve the request which will include the explanation provided below.

Maximum of 300 characters

[Exit](#) [Next](#)

How to Create a New Plan and Add Existing Plan to Your Account

Create New Plan / Add Existing Plan Page

Add an Existing Plan: Active Filing Coordinator

- Confirm the Plan Details on the EIN/PN Lookup Results Page
 - Plan name
 - EIN/PN
 - Existing FC Status: **Active**
- Enter the mandatory explanation (300 characters max).
- Click “Next” to continue to the Plan Creation Captcha page.

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Incident Generation

EIN/PN Lookup Results

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details are listed below.

Plan Details:
Plan Name: SPECIAL NON-PREMIUM TRANSACTIONS
EIN/PN: 123456789/001
Existing Filing Coordinator Status: Active

Explanation

Please provide an explanation as to why you would like to add an existing plan to your My PAA account. Your explanation will be reviewed and can be used to expedite the approval process.

Note: An automated email will be sent to the Filing Coordinator and/or Plan Administrator on file to approve the request which will include the explanation provided below.

Mandatory Explanation: Max 300 characters

Exit Next

Existing Filing Coordinator Status: Active

New Plan/Add Existing Plan Information
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Plan Creation Captcha

Please enter the following text:

reaoxe

Submit

How to Create a New Plan and Add Existing Plan to Your Account

New Plan/Add Existing Plan Information Page

Add an Existing Plan: Active Filing Coordinator

- My PAA will send an automated email message to the existing Filing Coordinator to grant you access to the Plan.
- Please note the incident number associated with this request in case any follow up with the PBGC Customer Support Team is needed.
- You will be able to begin any premium related action for the plan once the plan has been added to your My PAA account by the plan's Filing Coordinator or a PBGC Customer Service Agent with authorization from the plan.

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Creation Captcha
Please enter the following text:
reaoxe

reaoxe

Submit

Exit

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Incident Generation

Request Complete

An incident [#230821-000012](#) has been opened to track your request. An email will be sent to the existing Filing Coordinator and/or Plan Administrator with your request and explanation to be added to the Filing Team. An existing Filing Coordinator must invite you before gaining access to the Plan via My PAA.

Plan Details:
Plan Name: SPECIAL NON-PREMIUM TRANSACTIONS
Plan ID: 86264
EIN/PN: 123456789/001
Existing Filing Coordinator Status: Active

Go to Plan List

Exit

How to Create a New Plan and Add Existing Plan to Your Account

Create New Plan / Add Existing Plan Page

Add an Existing Plan: Inactive Filing Coordinator

- On the Lookup Results Page to confirm the Plan Details.
 - Plan name
 - EIN/PN
 - Existing FC Status: Inactive
- Enter the mandatory explanation (300 characters max).
- Click “Next” to continue to the Plan Creation Captcha page.

New Plan/Add Existing Plan Information

Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Incident Generation

EIN/PN Lookup Results

The EIN/PN combination you entered already exists in PBGC records. Relevant Plan details are listed below.

Plan Details:
Plan Name: TEST PLAN I
EIN/PN: 77777777/777

Existing Filing Coordinator Status: Inactive

Explanation

Please provide an explanation as to why you would like to add an existing plan to your My PAA account. Your explanation will be reviewed and can be used to expedite the approval process.

Note: An automated email will be sent to the Filing Coordinator and/or Plan Administrator on file to approve the request which will include the explanation provided below.

Maximum of 300 characters

This value is mandatory.

Next

Exit

Existing Filing Coordinator Status: Inactive

New Plan/Add Existing Plan Information

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Plan Creation Captcha

Please enter the following text:

apple


How to Create a New Plan and Add Existing Plan to Your Account

New Plan/Add Existing Plan Information Page


Add an Existing Plan: Inactive Filing Coordinator

- My PAA will send the incident to a PBGC Customer Service agent if there is no existing Filing Coordinator. No action is required from you at this time, the PBGC Customer Service agent will contact you.
- Please note the incident number associated with this request in case any follow up with the PBGC Customer Support Team is needed.
- You will be able to begin any premium related action for the plan once the plan has been added to your My PAA account by a PBGC Customer Service Agent with authorization from the plan.

New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

Plan Creation Captcha
Please enter the following text:


New Plan/Add Existing Plan Information
Published 11/14/2019 04:20 PM | Updated 04/11/2021 01:35 PM

 Incident Generation

Request Complete

An incident [#230821-000015](#) has been opened to track your request. A PBGC Customer Service Agent will contact you shortly since there is no active Filing Coordinator for this Plan.

Plan Details:
Plan Name: TEST PLAN I
Plan ID: 2853796
EIN/PN: 77777777/777
Existing Filing Coordinator Status: Inactive