

# How to View and Edit Plan Details

My Plan Administration Account (My PAA)

*Last Updated: July 30, 2024*

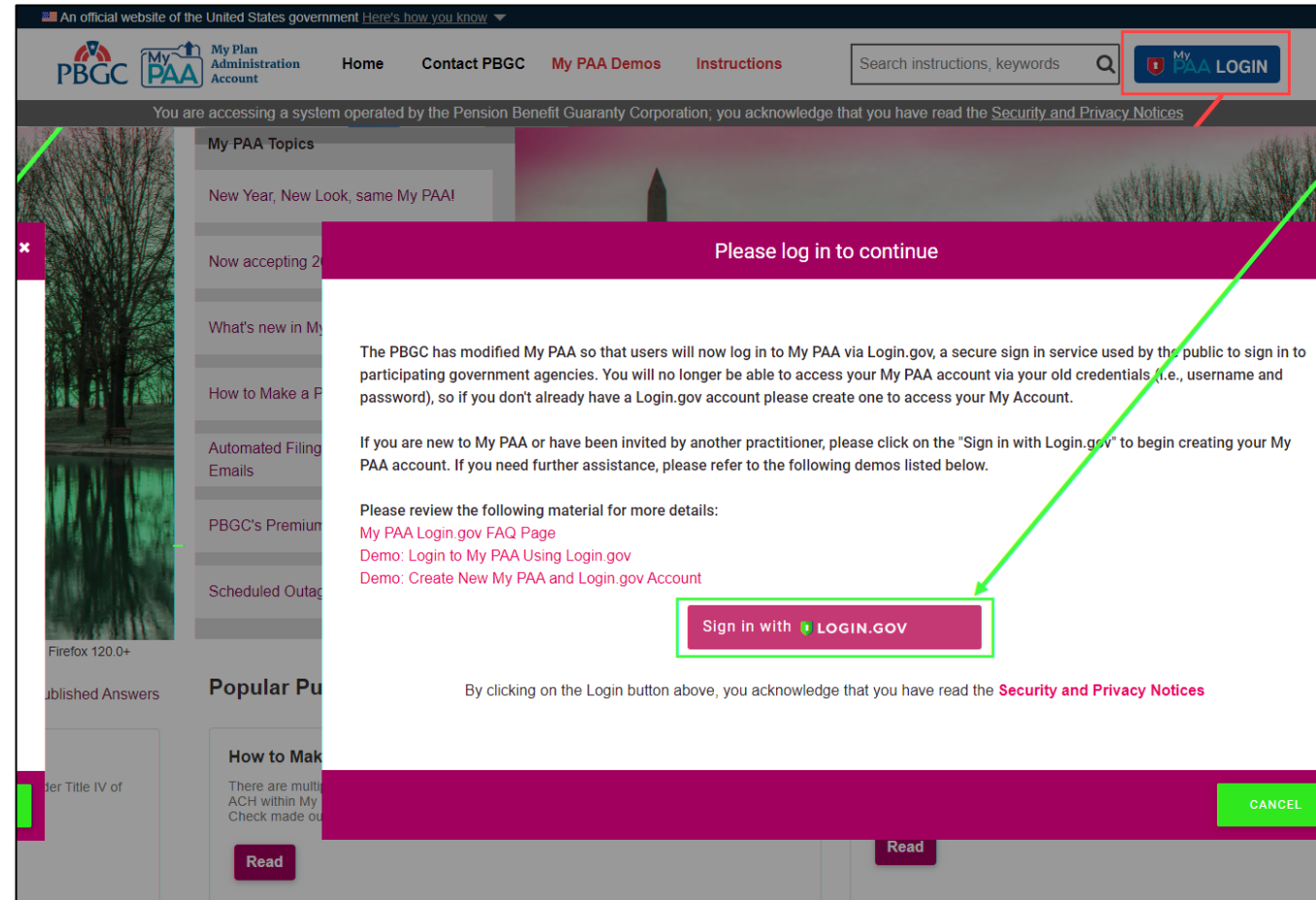


# Step-by-Step Instructions

# How to View and Edit Plan Details

## 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.



# How to View and Edit Plan Details

## 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 want to update the Plan Admin/Contact Details for.

**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 PYC	Latest Filing Status
	2420303	131311313	121	<a href="#">MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN UPDATE</a>	07/26/2024	<a href="#">539331</a>		Draft
	86264	123456789	001	<a href="#">SPECIAL NON-PREMIUM TRANSACTIONS</a>	06/05/2024	<a href="#">500753</a>	01/01/2022	Submitted
	2420311	898989898	898	<a href="#">PRACTITIONER REMOVED FROM ANOTHER PLAN</a>	11/01/2023	<a href="#">506658</a>	01/01/2023	Draft

Showing 1 to 3 of 3 entries

First 1 Last

# How to View and Edit Plan Details

## Plan Details Page

- Simply click on the “Admin/Contact Details” button from the Plan Details Page. The details of the Plan Admin and Plan Contact will be displayed in the section below.
- To edit this information, click on the “Update Details” button within the Admin/Contact Details section.

The screenshot displays the PBGC My PAA Account interface. At the top, there is a navigation bar with links for Home, Contact PBGC, My PAA Demos, and Instructions, along with a search bar and a user profile dropdown. Below the navigation bar, a red banner contains a message about a system redesign. The main content area features a 'Return to Plan List' link and a 'Plan Details Page' header. A table provides key plan information:

Plan Name:	Plan ID:	Plan Status:	EIN:	PN:	Effective Date:	Plan Sponsor:
MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN UPDATE	2420303	Active	131311313	121	04/24/2021	No Value

Below the table, there are several action buttons: Create Filing, Submit Request, Manage Roles, Payment Voucher, Account History, View Request Status, and View Correspondence. A secondary navigation bar includes Premium Filings, Team Members, and Admin/Contact Details (highlighted with a red box and a star). Under the Admin/Contact Details section, there is a sub-section titled 'Plan Admin / Plan Contact Details' with an 'Update Details' button (also highlighted with a red box and an arrow). A red star is placed above the 'Admin/Contact Details' button, and a red arrow points from it to the 'Update Details' button. Below this, a text block instructs users to review and update information as needed. The bottom of the page shows two columns of details: Plan Admin Details (Admin Name: Raj Smith, Address 1: 1200 K ST SW, Address 2: Suite 6809 BF, City, State, Zip, Country: Wash, AI, 20111vbbb, CA, Phone, Ext: (123)-456-9870 x1234) and Plan Contact Details (Contact Name: Ashley, Phone, Ext: (202)-229-3952 x9876, Email).

# How to View and Edit Plan Details

## Update Plan Information Page

- After clicking on the “Update Details” button, you will be brought to the Update Plan Information Page.
- The Plan Name and the details of the Plan Admin and Plan Contact can be updated accordingly.
- Click the “Next” button when finished making your edits.

The screenshot shows the PBGC 'Update Plan Information' page. The main form contains the following sections:

- Update Plan Details:** Includes 'EIN/PN Summary' (EIN/PN: 131311313 / 121, Plan ID: 2420303), 'Plan Name' (MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN), and 'Plan Admin Information' (Admin's Name: Raj Smith, Raj Smith's Email Address: Raj.Smith@pbgc.gov, Raj Smith's Phone Number: (202) 326-4000, Raj Smith's Phone Extension: [empty]).
- Address Information:** Address 1: 0548 Q NA SC, Address 2: Hgowb 2504 EJ, Country: United States (US), City: Wash, State: AR, Zip Code: 20145.
- Plan Contact Information:** Plan Contact Name (Correspondence Addressee): test, Plan Contact Email Address: test@cc.com, Plan Contact Phone Number: (121) 333-3333, Plan Contact Phone Extension: [empty].

A red arrow points from the 'Next' button in the 'Plan Contact Information' section to the 'Next' button in the main form.

# How to View and Edit Plan Details

## Update Plan Information Page

- Once you have entered your updates, you will be brought to the “Update Plan Summary” Page.
- Review and confirm the change you have made are accurate, and then click “Submit.”
- Once submitted you will be brought to the Plan Update Request Complete Page. This will confirm that the PBGC has received, and successfully processed your updates.
- Click on the “Back to Plan Details” button to review the updates.

**Update Plan Information**  
Published 06/03/2020 02:48 PM | Updated 05/04/2021 03:19 PM

### Update Plan Summary

**EIN/PN Summary**  
Please review and confirm your changes.

EIN/PN: 131311313 / 121  
Plan ID: 2420303

Plan Name:	MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN
Plan Admin Name:	Raj Smith
Plan Admin Email Address:	Raj.Smith@pbgc.gov
Plan Admin Phone Number:	(202) 326-4000
Plan Admin Phone Extension:	
Plan Admin Address 1:	0548 Q NA SC
Plan Admin Address 2:	Hgowb 2504 EJ
Plan Admin City:	Wash
Plan Admin State:	AR
Plan Admin Zip Code:	20145
Plan Admin Country:	US
Plan Contact Name (Correspondence Addressee):	test
Plan Contact Email Address:	test@cc.com
Plan Contact Phone Number:	(121) 333-3333
Plan Contact Phone Extension:	

Back Submit

Exit

**Update Plan Information**  
Published 06/03/2020 02:48 PM | Updated 05/04/2021 03:19 PM

### Plan Update Request Complete

You have successfully updated your Plan in My PAA with the details below.

If you do not receive a confirmation email for this updated Plan, please contact us [here](#).

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

Exit Back to Plan Details

# How to View and Edit Plan Details

## Updated Plan Information on the Plan Details Page

- It is important to note that this information is also reflected in the most recent Comprehensive Premium Filing, as the system will automatically update the plan records accordingly upon submission of the filing.

The screenshot displays the 'Plan Details Page' for a specific plan. At the top, there is a navigation bar with the PBGC logo, '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.gm...) are also present. Below the navigation, a disclaimer states: '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.' A 'Return to Plan List' link is provided. The main content area features a table with the following details:

Plan Name:	Plan ID:	Plan Status:	EIN:	PN:	Effective Date:	Plan Sponsor:
MY PAA 2.0 PROD CUT OVER CREATE TEST PLAN	2420303	Active	131311313	121	04/24/2021	test

Below the table, there are several action buttons: 'Create Filing', 'Submit Request', 'Manage Roles', 'Payment Voucher', 'Account History', 'View Request Status', and 'View Correspondence'. A secondary row of buttons includes 'Premium Filings', 'Team Members', and 'Admin/Contact Details'. The 'Admin/Contact Details' section is expanded, showing a table with two columns: 'Plan Admin Details' and 'Plan Contact Details'. The 'Update Details' button is visible next to the section header.

Plan Admin Details	Plan Contact Details
<b>Admin Name</b> Raj Smith <b>Address 1</b> 0548 Q NA SC <b>Address 2</b> Hgowb 2504 EJ <b>City, State, Zip, Country</b> Wash, AR, 20145, US <b>Phone, Ext</b> (202)-326-4000 <b>Email</b> moje.xavier@pbgc.gov	<b>Contact Name</b> test <b>Phone, Ext</b> (121)-333-3333 <b>Email</b> test@cc.com

Below the table, a disclaimer reads: 'Please review the Plan Administrator and Plan Contact information for this Plan below. If any of this information requires updating, select the "Update Details" button and follow the instructions to update the data as needed. Please note that it may take a few minutes for any updates made to be reflected on this page.'