Screen Shots for Practitioner Focus Groups

DRAFT 09/18/2014

Note: To most clearly approximate the customer experience, we have used real-*appearing* customer data in the screen shots; however, *all* customer addresses, phone numbers, email addresses, individual and plan names, plan numbers, document names, and filing IDs are fictional.

Contents:

1. Current My PAA Home Page

PBGC My PAA

v.14.2.0.14 **Welcome, Rupali Kamat!**
My Account | Logout | My PAA Users Manual (PDF)

Home Page

How to Use My PAA

Add a Plan to your Account

Instructions

There must be at least one plan in your account to e-file.

Add a Plan as Filing Coordinator

In-Process Filings

Instructions

Only for filings created using My PAA data entry screens and imported filings.

Where's my filing?

Filing	Last Routed	Plan Name (EIN/PN)	Held By	Clear Sort
2014 Comprehensive		MM INSURANCE COMPANY DEFINED BENEFIT PENSION PLAN (22-0022001/001)	Rupali Kamat	View/Manage Filing
2013 Comprehensive	06/26/2014	A. S. I. B. S. A PENSION FUND (22-1122441/001)	Rupali Kamat	View/Manage Filing

Create Filing In My PAA Data Entry & Editing Screens (for any plan in your account)

Plans in Your Account

Instructions

Search by Plan Name OR EIN | Clear Search

Plan Name (EIN/PN)			
A. S. I. B. S. A. PENSION FUND (22-1122441/001)	Go to Plan Page	Invite a Practitioner	Create Filing
MM INSURANCE COMPANY DEFINED BENEFIT PENSION PLAN (22-0022001/001)	Go to Plan Page	Invite a Practitioner	Create Filing

Import Software-Prepared Filing(s) into My PAA Editing Screens

Instructions

Transfer filing data into My PAA editing screens for review and submission for any plan(s) in your account.

Import Filing(s)

Upload Software-Prepared Filing(s)

Instructions

Submit fully-completed filing(s) for any plan(s) once you have at least one plan in your account. After the file is uploaded, click the link (if shown) under "Conf. ID/ Receipt" to view the receipt(s) showing data submitted for each filing. View this section's Instructions for details.

Upload Filing(s)

File Name	Conf. ID/Receipt	Received	Filing Status	Payment Status
2014_ME_Toyota_CPF.xml	3751600	7/22/2014 10:59:47 AM	Completed	Other
Comments:				
Comp_Sample_1.xml	3751506	4/30/2014 2:40:41 PM	Completed	Paper Check
Comments:				

Helpful Links

- About Online Premium Filing
- My PAA Users Manual (PDF)
- Blank Paper Check Voucher (for printing)
- Complete Filing Instructions
- Filing Due Dates for Current Plan Year
- Submit a Premium Filing Question

PBGC.gov | Privacy Act Notice | Paperwork Reduction Act Notice | Contact Us | About Online Premium Filing

2. Current My PAA Plan Page

PBGC My PAA

v.14.2.0.14

My Home Page | My Account | Logout | My PAA Users Manual (PDF)

Plan Page

Instructions

A. S. I. B. S. A. PENSION FUND - 22-1122441 / 001

Plan Sponsor:
A S I B S A Pension Fund

Plan Administrator:
Rohnsons Inc
201 Westchester Avenue
White Plains, NJ 10661
US
(202) 456-5222

Plan Contact:
GERALD WOO
(508) 378-8417

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 toll-free at 1-800-877-8339 and ask to be connected.

Premium Filings In Process Online

This section shows filings that are being prepared using My PAA's data entry and editing screens - prior to submission to PBGC. See section below to view submitted filings.

Create Filing

Comprehensive Filing for Plan Year Commencing 2/1/2013 — View/Manage Filing

Premium Filing Practitioners

Invite a Practitioner

Name	Permissions	Phone	Email	
Rupali Kamat	Preparer, View Account History, Filing Coordinator	202-456-5110	RUPALI@PBGC.GOV	Remove
Seter Lee	Filing Coordinator, Actuary, Preparer, Paying Agent, Plan Administrator	202-326-4000	SETER@PBGC.GOV	Remove

Premium Filings Received Online By PBGC

Filing	ID	Received
2014 COMPREHENSIVE	3741464	7/10/2014 1:21:22 PM
2013 COMPREHENSIVE	3741391	6/23/2014 11:28:06 AM
2012 COMPREHENSIVE	3741385	6/23/2014 10:01:23 AM

Account History

About Account Histories

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.

Account History

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3. Proposed My PAA Launch Page

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 links below to go to the section of the screens to initiate the tasks shown.

New Users:

- Get Started

Returning Users:

- Update My PAA Account
- 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)

Filing Coordinators:

- Add a Plan
- Add a Practitioner
- Remove a Practitioner
- Change a Practitioner's Permissions

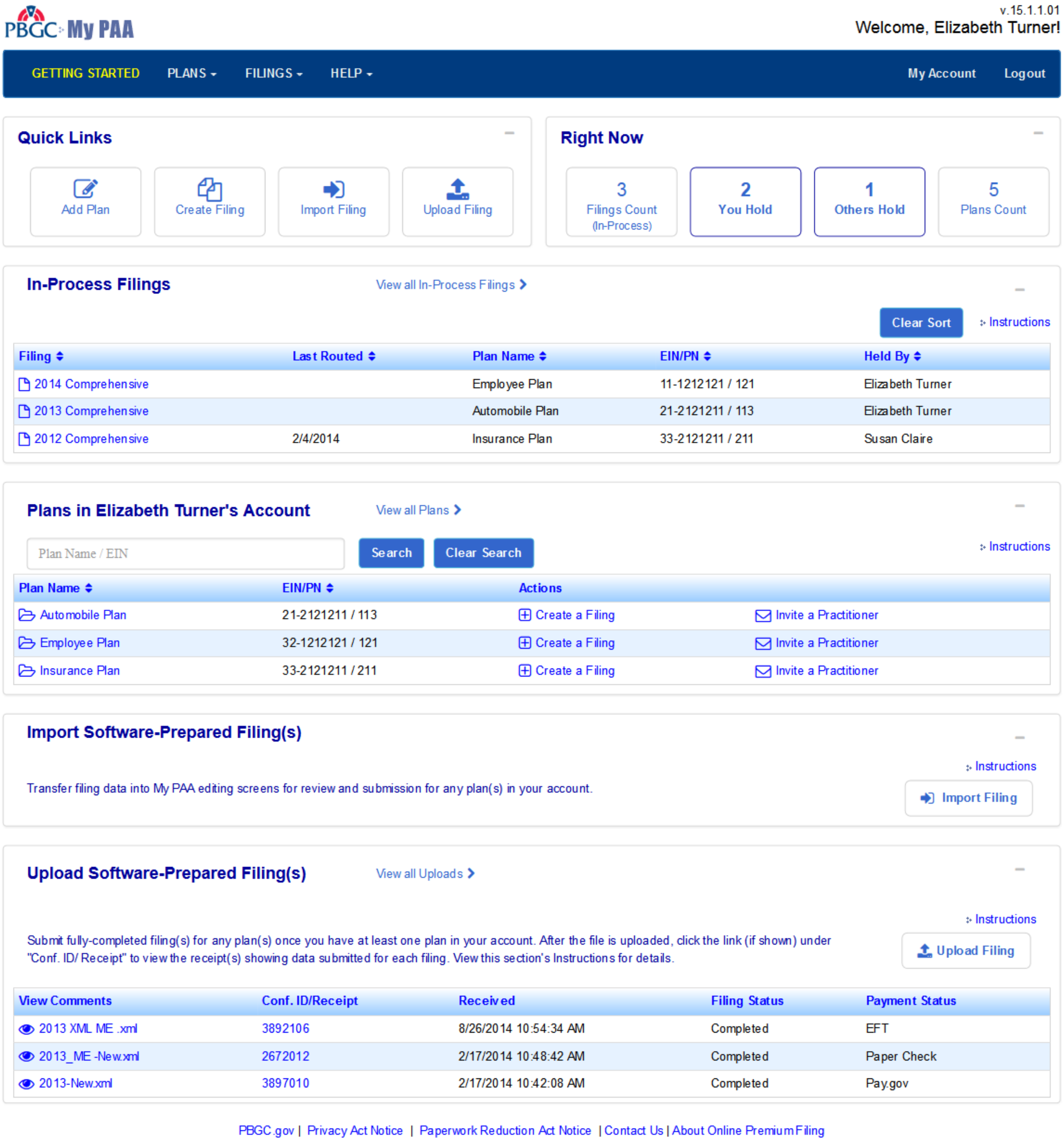
Additional Resources:

- Helpful Links

☐ **Do not show this page again**

Close

4. Proposed My PAA Home Page



PBGC My PAA

v.15.1.1.01

Welcome, Elizabeth Turner!

GETTING STARTED | PLANS | FILINGS | HELP | My Account | Logout

Quick Links

Add Plan | Create Filing | Import Filing | Upload Filing

Right Now

3 Filings Count (In-Process) | 2 You Hold | 1 Others Hold | 5 Plans Count

In-Process Filings

View all In-Process Filings

Clear Sort | Instructions

Filing	Last Routed	Plan Name	EIN/PN	Held By
2014 Comprehensive		Employee Plan	11-1212121 / 121	Elizabeth Turner
2013 Comprehensive		Automobile Plan	21-2121211 / 113	Elizabeth Turner
2012 Comprehensive	2/4/2014	Insurance Plan	33-2121211 / 211	Susan Claire

Plans in Elizabeth Turner's Account

View all Plans

Plan Name / EIN | Search | Clear Search | Instructions

Plan Name	EIN/PN	Actions	
Automobile Plan	21-2121211 / 113	Create a Filing	Invite a Practitioner
Employee Plan	32-1212121 / 121	Create a Filing	Invite a Practitioner
Insurance Plan	33-2121211 / 211	Create a Filing	Invite a Practitioner

Import Software-Prepared Filing(s)

Instructions

Transfer filing data into My PAA editing screens for review and submission for any plan(s) in your account.

Import Filing

Upload Software-Prepared Filing(s)

View all Uploads

Instructions

Submit fully-completed filing(s) for any plan(s) once you have at least one plan in your account. After the file is uploaded, click the link (if shown) under "Conf. ID/ Receipt" to view the receipt(s) showing data submitted for each filing. View this section's Instructions for details.

Upload Filing

View Comments	Conf. ID/Receipt	Received	Filing Status	Payment Status
2013 XML ME .xml	3892106	8/26/2014 10:54:34 AM	Completed	EFT
2013_ME -New.xml	2672012	2/17/2014 10:48:42 AM	Completed	Paper Check
2013-New.xml	3897010	2/17/2014 10:42:08 AM	Completed	Pay.gov

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5. Proposed My PAA Plan Page

PBGC My PAA

GETTING STARTED | HOME | PLANS | FILINGS | HELP | My Account | Logout

Instructions

Automobile Plan 21-2121211 / 113

Plan Information

Plan Sponsor:
Automobile Company

Plan Administrator:
Automobile Company
123 Main Street, Washington, DC, 22222
(242) 912-1111

Plan Contact:
Elizabeth Turner
(242) 912-1021

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 toll-free at 1-800-877-8339 and ask to be connected.

Account History

Premium Filing and Payments Received by PBGC

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

Premium Filings for the Plan (Screen-Prepared and Imported Only)

+Create a New Filing

All In-Process Submitted

Filing	ID	Received Date	Status
2013 Comprehensive			IN-PROCESS
2014 Comprehensive	3412222	2/26/2014 11:54:34 AM	SUBMITTED
2012 Comprehensive	6565443	4/26/2012 10:54:34 AM	SUBMITTED

Premium Filing Practitioners for the Plan

+Invite a Practitioner

Edit	Name	Permissions	Phone	Email	Remove Practitioner
	Elizabeth Turner	Preparer, Actuary, Paying Agent, Filing Coordinator, View Account History, Plan Administrator	242-912-1021	Liz.Turner@email.gov	
	Mike Gary	Preparer, Actuary, Paying Agent, Filing Coordinator, View Account History, Plan Administrator's Representative	333-333-3555	Mike.Gary@email.gov	
	Kati Thomas	Preparer, Actuary, Paying Agent, Filing Coordinator, Plan Administrator	777-777-7777	Kati.Thomas@email.gov	

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6. Pbgc.gov home page

7. Pbgc.gov practitioners page

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Home > Practitioners

What are you looking for? Search

Practitioners

- Online Premium Filing (My PAA)
- What's New for Practitioners
- Pension Insurance Data
- Premium Payment Instructions & Addresses
- Premium Filings
- Interest Rates & Factors
- Mortality, Retirement and PV Max Guarantee
- Reporting & Disclosure
- Plan Terminations
- Appeals Board
- Risk Mitigation Program
- Multiemployer Plans
- Other Guidance
- Laws & Regulations
- Forms

Are you a practitioner responsible for one or more defined benefit plans insured by PBGC? Find the information and tools you need on premium filings, interest rates and factors, reporting and disclosure, and more.

Frequently Asked Questions for Practitioners
Laws and Regulations

Premium Filings

Find information on premium filings, including filing instructions, mailing addresses, due dates, late payment charges, and more

Interest Rates and Factors

Access information on various interest rates used for calculating premiums, lump-sum benefits, annuities, and late payment penalties for premiums and multiemployer withdrawal liability, on mortality tables, and more.

Reporting & Disclosure

Learn more about reporting and disclosure requirements, including reportable events, section 4010 reporting by certain underfunded plans, participant notices, and applicable Department of Labor requirements.

Plan Terminations

See rules and requirements for standard, distress, and PBGC-initiated plan terminations, handling missing participants, premiums due for

Online Premium Filing (My PAA)

My PAA is PBGC's secure online application for electronic submission of premium filings and payments.

Log In to My PAA
Create a New Account
How to Use My PAA

Related Information

Practitioner Filing Reminders
Present Value of PBGC Maximum Guarantee
What's New for Practitioners

Termination Forms and Instructions

Standard Terminations
Forms | Instructions

Distress Terminations
Forms | Instructions

Missing Participants
Forms | Instructions

These forms and instructions must be used for terminations for which the Notice of Intent to Terminate (NOIT) is issued on or after June 1, 2014. For NOITs issued before June 1, 2014, either these forms and instructions or the old forms and instructions may be used.

8. Pbgc.gov What’s New for Practitioners page

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- Laws & Regulations
- Forms

What's New for Practitioners

Sign up to receive What's New for Practitioners e-mail updates

PBGC.gov has new navigation features. As pension plan practitioners, you’re important customers to PBGC, and we want to ensure you have the best experience while using PBGC.gov. We’d like to highlight some recent improvements to our site that we hope will help you find what you’re looking for.

» First, we now have drop-down menus on the top navigation bars on every page on PBGC.gov, which are becoming an industry best practice on sites like WhiteHouse.gov and others. On the PBGC.gov home page, you’ll see arrows next to Workers & Retirees, Practitioners, and About PBGC. Hover over those arrows to find additional links to the most popular pages for those areas.

» Second, we developed a fully automated A-Z index and are promoting it on every page on our site. The index includes all of our web pages, including the individual “home pages” for each of our trusteed plans. Users who know the name of their plan can now either search or use our A-Z index to get where they need to be.

» Third, we removed the “Resources” section of our website, and distributed the information into the more relevant Practitioners and About PBGC categories.

Our blog, Retirement Matters, continues to be one of the best ways to stay up to date with PBGC and our work to ensure retirement security. To be notified when we post new entries, you can subscribe to the blog, Retirement Matters. We welcome your feedback on these changes. Please direct your comments to webmaster@pbgc.gov. Due to the volume of emails, we regret that we may not be able to respond to each individually. (08/04/14)

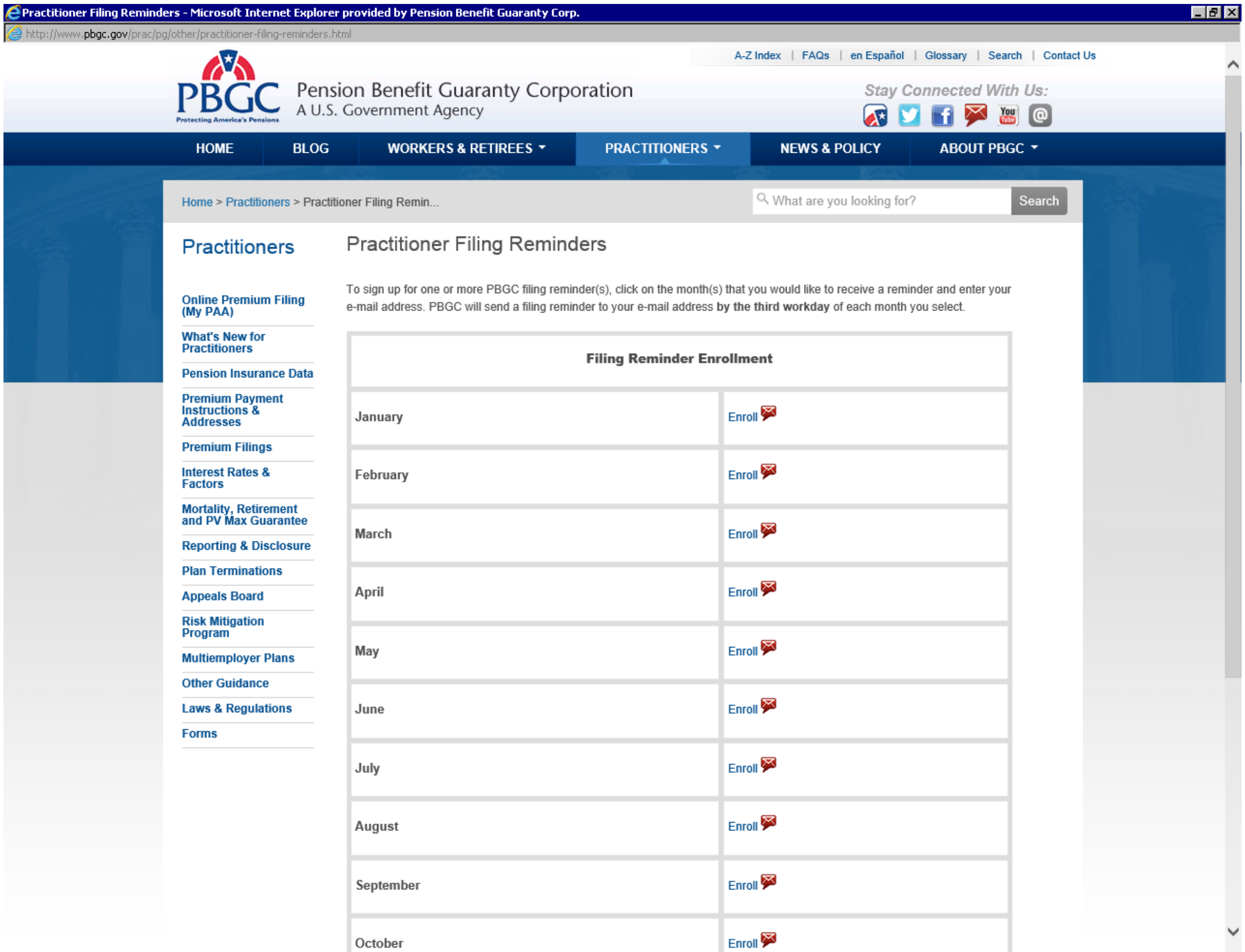
Multiemployer Plans; Valuation and Notice Requirements Final Rule. On May 28, 2014, PBGC published a final rule amending PBGC’s multiemployer regulations. The changes were developed as a result of PBGC’s regulatory review. The amendments reduce the number of actuarial valuations required for certain small terminated but not insolvent plans, shorten the advance notice filing requirements for mergers in situations that do not involve a compliance determination, and remove certain insolvency notice and update requirements. (05/28/14)

Shutdown benefits final rule. On May 6, 2014, PBGC published a final rule amending its benefit payment regulation to implement the Pension Protection Act of 2006 provision that the phase-in period for PBGC’s guarantee of benefits contingent upon the occurrence of an “unpredictable contingent event,” such as a plant shutdown, starts no earlier than the date of the event. Under the statute, the change applies to benefits that become payable as a result of an event that occurs after July 26, 2005. The regulation includes examples that show how the phase-in rules apply to PBGC benefits in various situations. (05/06/14)

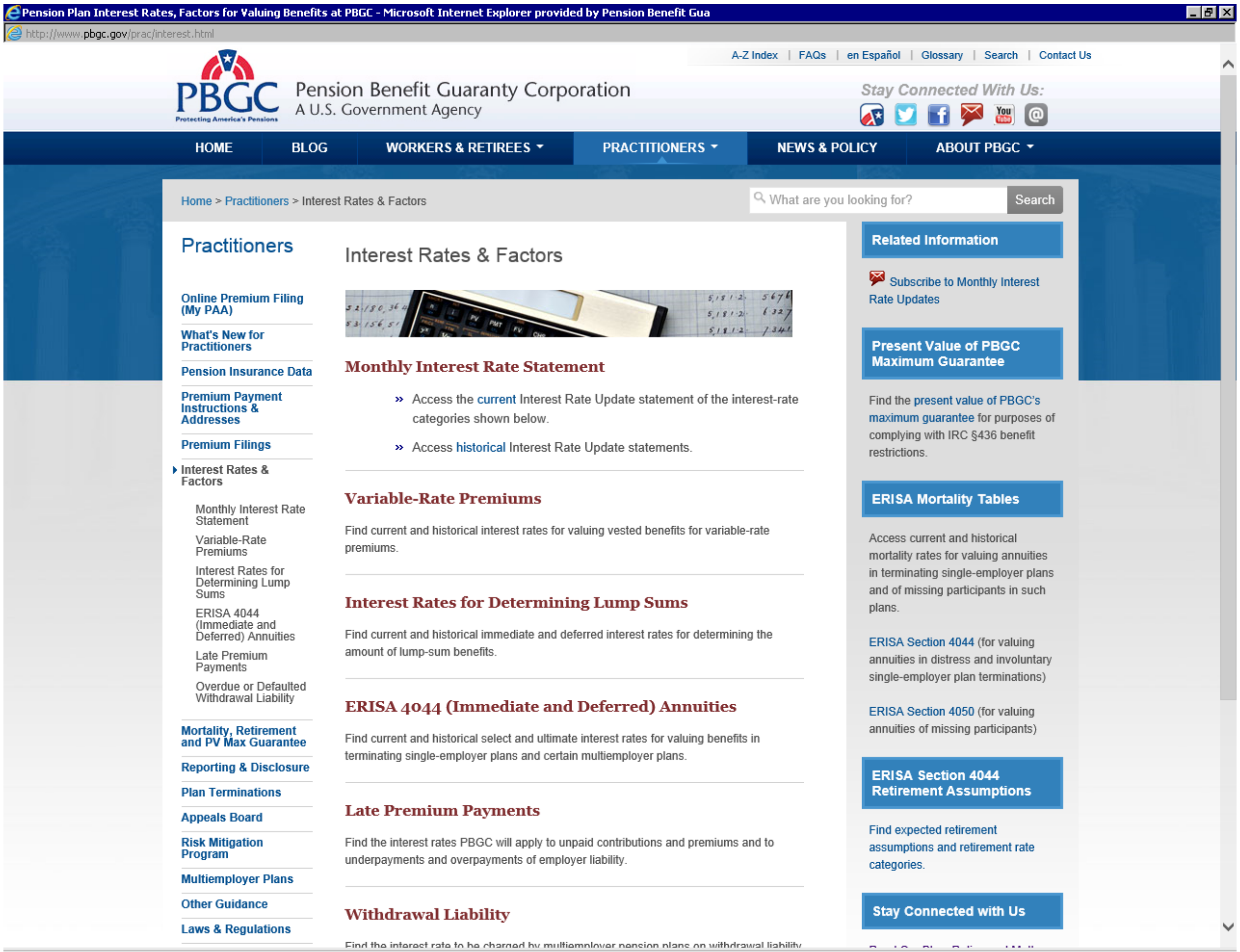
Standard and distress terminations and missing participants forms and instructions. OMB has approved revisions to the standard termination, distress termination, and missing participants forms and instructions. The new forms and instructions can be found on the Plan Terminations page of PBGC’s website. The new forms *must* be used for terminations for which the first Notice of Intent to Terminate is issued on or after June 1, 2014. If the first Notice of Intent to Terminate is issued before June 1, 2014, either the new or old forms may be used. (04/24/14)

My PAA ready for 2014 Premium Filings. My PAA has been updated to reflect recent changes to the premium regulation (first effective for 2014 plan years) as described in the 2014 premium filing instructions. Comprehensive filings for plan years beginning

9. Pbgc.gov filing reminders page



10. Pbgc.gov interest rates page



Pension Plan Interest Rates, Factors for Valuing Benefits at PBGC - Microsoft Internet Explorer provided by Pension Benefit Gua

http://www.pbgc.gov/prac/interest.html

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Home > Practitioners > Interest Rates & Factors

What are you looking for? Search

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- Premium Payment Instructions & Addresses
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  - Monthly Interest Rate Statement
  - Variable-Rate Premiums
  - Interest Rates for Determining Lump Sums
  - ERISA 4044 (Immediate and Deferred) Annuities
  - Late Premium Payments
  - Overdue or Defaulted Withdrawal Liability
- Mortality, Retirement and PV Max Guarantee
- Reporting & Disclosure
- Plan Terminations
- Appeals Board
- Risk Mitigation Program
- Multiemployer Plans
- Other Guidance
- Laws & Regulations

Interest Rates & Factors

Monthly Interest Rate Statement

» Access the current Interest Rate Update statement of the interest-rate categories shown below.

» Access historical Interest Rate Update statements.

Variable-Rate Premiums

Find current and historical interest rates for valuing vested benefits for variable-rate premiums.

Interest Rates for Determining Lump Sums

Find current and historical immediate and deferred interest rates for determining the amount of lump-sum benefits.

ERISA 4044 (Immediate and Deferred) Annuities

Find current and historical select and ultimate interest rates for valuing benefits in terminating single-employer plans and certain multiemployer plans.

Late Premium Payments

Find the interest rates PBGC will apply to unpaid contributions and premiums and to underpayments and overpayments of employer liability.

Withdrawal Liability

Find the interest rate to be charged by multiemployer pension plans on withdrawal liability

Related Information

Subscribe to Monthly Interest Rate Updates

Present Value of PBGC Maximum Guarantee

Find the present value of PBGC's maximum guarantee for purposes of complying with IRC §436 benefit restrictions.

ERISA Mortality Tables

Access current and historical mortality rates for valuing annuities in terminating single-employer plans and of missing participants in such plans.

ERISA Section 4044 (for valuing annuities in distress and involuntary single-employer plan terminations)

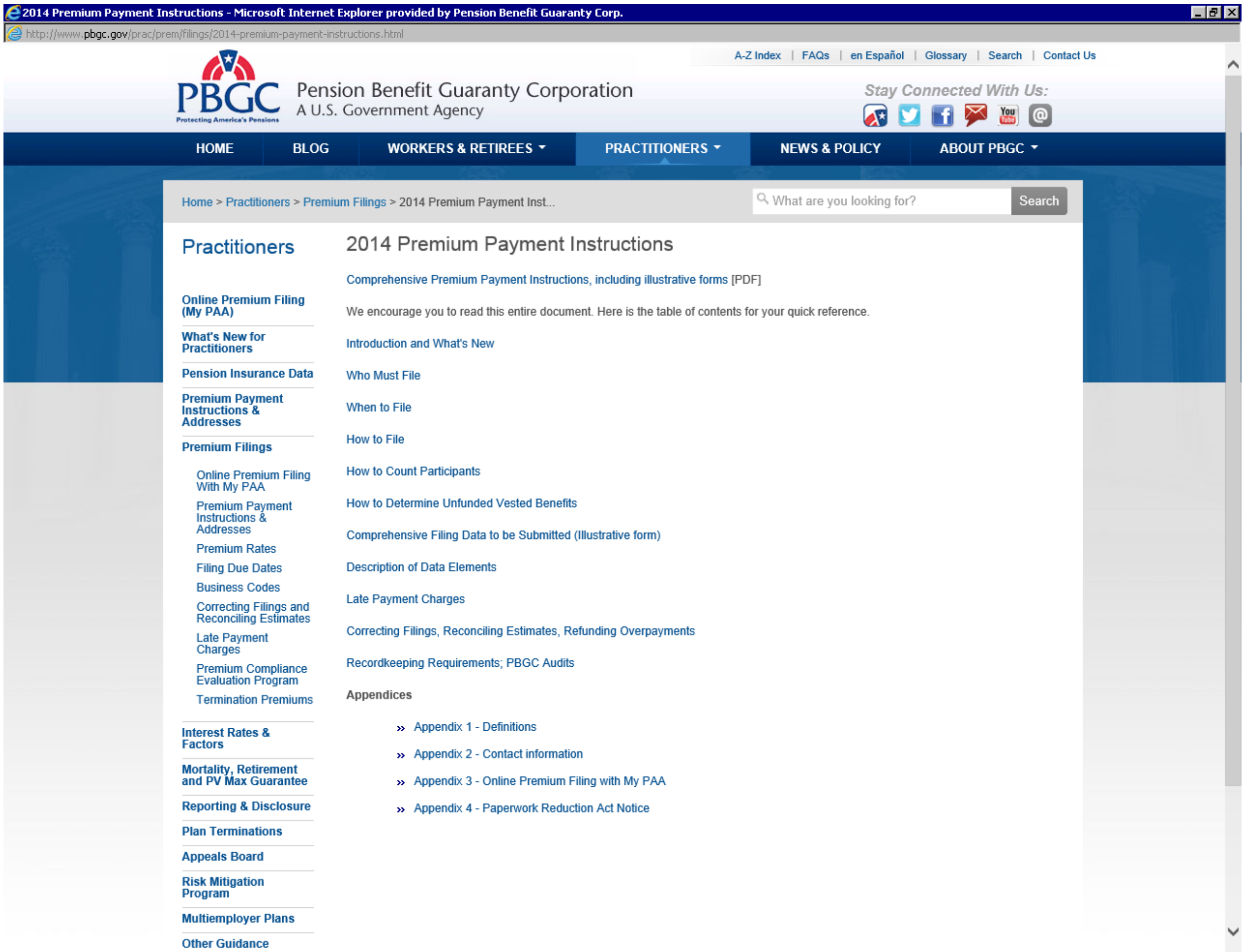
ERISA Section 4050 (for valuing annuities of missing participants)

ERISA Section 4044 Retirement Assumptions

Find expected retirement assumptions and retirement rate categories.

Stay Connected with Us

11. Premium payment instructions


2014 Premium Payment Instructions - Microsoft Internet Explorer provided by Pension Benefit Guaranty Corp.

http://www.pbgc.gov/prac/prem/filings/2014-premium-payment-instructions.html

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What are you looking for? Search

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  - Filing Due Dates
  - Business Codes
  - Correcting Filings and Reconciling Estimates
  - Late Payment Charges
  - Premium Compliance Evaluation Program
  - Termination Premiums
- Interest Rates & Factors
- Mortality, Retirement and PV Max Guarantee
- Reporting & Disclosure
- Plan Terminations
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- Other Guidance

2014 Premium Payment Instructions

Comprehensive Premium Payment Instructions, including illustrative forms [PDF]

We encourage you to read this entire document. Here is the table of contents for your quick reference.

Introduction and What's New

Who Must File

When to File

How to File

How to Count Participants

How to Determine Unfunded Vested Benefits

Comprehensive Filing Data to be Submitted (Illustrative form)

Description of Data Elements

Late Payment Charges

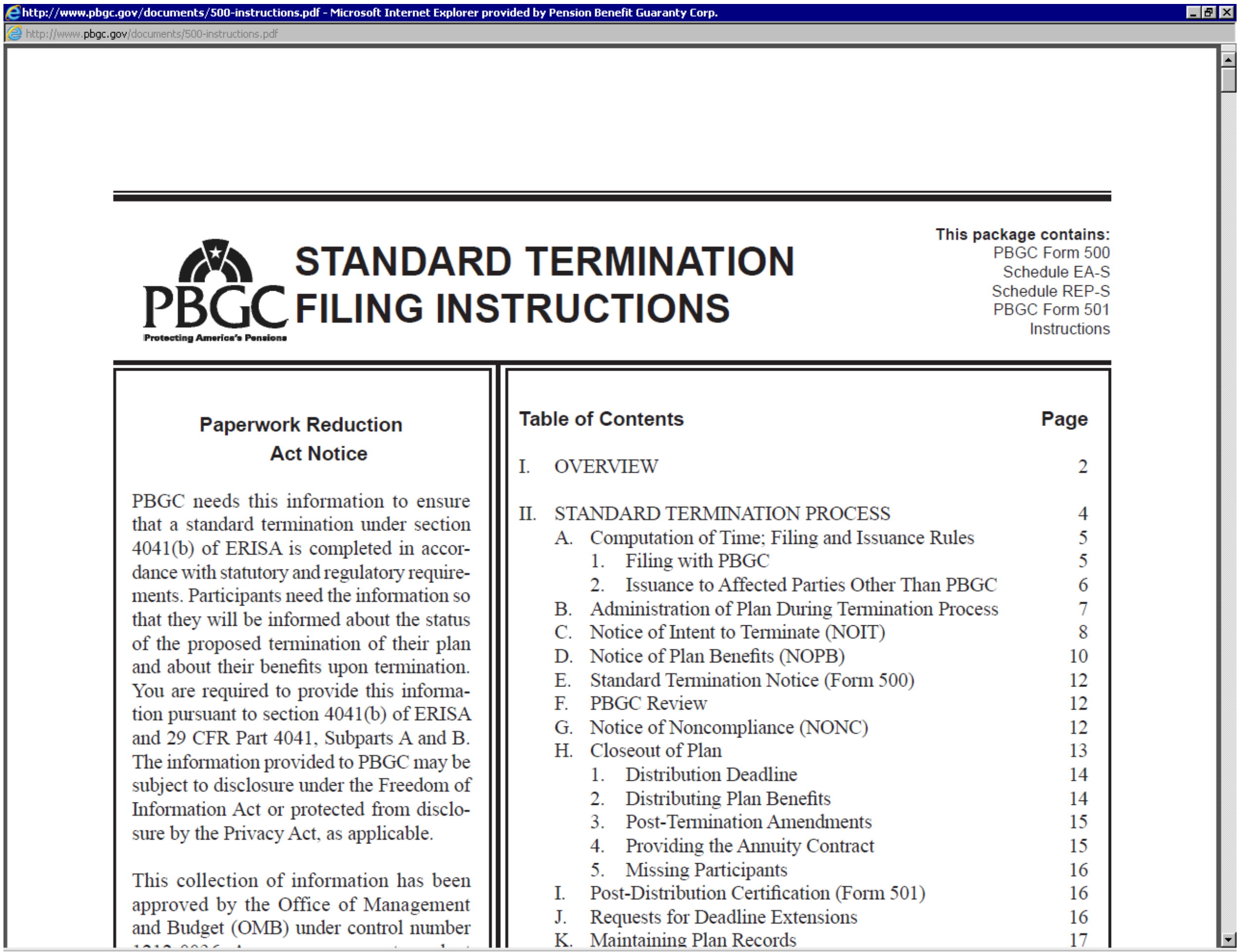
Correcting Filings, Reconciling Estimates, Refunding Overpayments

Recordkeeping Requirements; PBGC Audits

Appendices

» Appendix 1 - Definitions
» Appendix 2 - Contact information
» Appendix 3 - Online Premium Filing with My PAA
» Appendix 4 - Paperwork Reduction Act Notice

12. Standard termination instructions


http://www.pbgc.gov/documents/500-instructions.pdf - Microsoft Internet Explorer provided by Pension Benefit Guaranty Corp.

PBGC
Protecting America's Pensions

STANDARD TERMINATION FILING INSTRUCTIONS

This package contains:
PBGC Form 500
Schedule EA-S
Schedule REP-S
PBGC Form 501
Instructions

Paperwork Reduction Act Notice

PBGC needs this information to ensure that a standard termination under section 4041(b) of ERISA is completed in accordance with statutory and regulatory requirements. Participants need the information so that they will be informed about the status of the proposed termination of their plan and about their benefits upon termination. You are required to provide this information pursuant to section 4041(b) of ERISA and 29 CFR Part 4041, Subparts A and B. The information provided to PBGC may be subject to disclosure under the Freedom of Information Act or protected from disclosure by the Privacy Act, as applicable.

This collection of information has been approved by the Office of Management and Budget (OMB) under control number

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