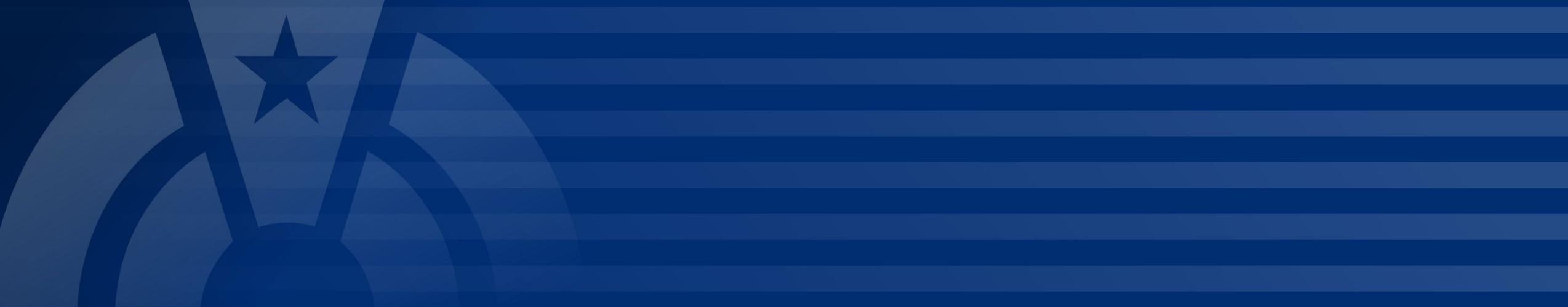


How to Submit a Request to PBGC: Refund Request

My Plan Administration Account (My PAA)

Last Updated: January 8, 2023





Step-by-Step Instructions

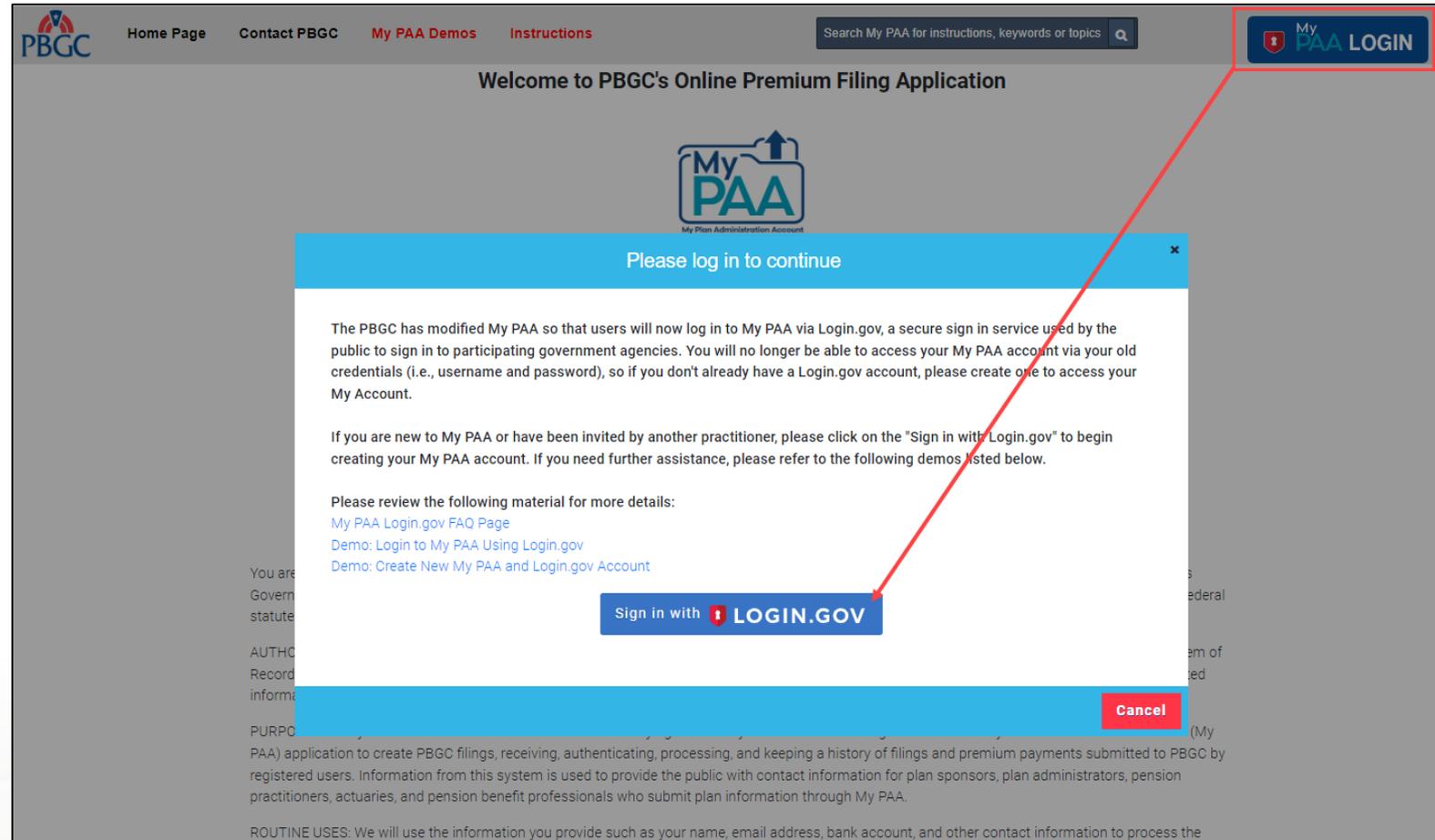


PBGCC

How to Submit a Refund Request

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 PBGC website's "My PAA LOGIN" page. At the top, there are navigation links for "Home Page", "Contact PBGC", "My PAA Demos", and "Instructions". A search bar is located on the right. The main heading reads "Welcome to PBGC's Online Premium Filing Application". Below this is the "My PAA" logo, which includes the text "My Plan Administration Account". A blue modal window is overlaid on the page with the title "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." It then states: "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." Below this, it says "Please review the following material for more details:" followed by three links: "My PAA Login.gov FAQ Page", "Demo: Login to My PAA Using Login.gov", and "Demo: Create New My PAA and Login.gov Account". At the bottom of the modal is a blue button that says "Sign in with LOGIN.GOV". A red arrow points from the "My PAA LOGIN" button in the top right corner of the page to the "Sign in with LOGIN.GOV" button in the modal. A "Cancel" button is visible in the bottom right corner of the modal.

How to Submit a Refund Request

Plan List Page

- Once you have logged in to My PAA, click on the “Plan List” icon or link from the Home Page.
- From the Plan List Page, click on the “Plan Details” button for the plan you would like to submit a request for.
 - To successfully submit a request, the plan must be associated with your account.
 - Please keep in mind that you must be the Plan Admin or Plan Admin Rep to submit a Refund Request. This option will not be available if you do not have this role associated with the account.
 - You can search or sort the columns to find a particular plan

Home Page Contact PBGC My PAA Demos Instructions Search My PAA for instructions, keywords or topics pbgctest@t...

Create New Plan / Add Existing Plan Plan List In-Process Upload Filings View Upload History

***Supported Browsers:** Google Chrome 97.0+, Microsoft Edge 97.0+, and Firefox 101.0+ (not Safari)

Plans in your My PAA Account

Show 10 entries Search:

ID	Plan ID	EIN	PN	Name	Last Filing Update	CREATE FILING	PLAN DETAILS
247133	7654321	999999999	009	PBGC HOLDINGS, INC. DEFINED BENEFIT	10/13/2022	CREATE FILING	PLAN DETAILS
249490	1234567	123456789	001	IPA, INC. DEFINED BENEFIT PLAN	09/19/2022	CREATE FILING	PLAN DETAILS

Showing 1 to 2 of 2 entries First 1 Last

How to Submit a Refund Request

Plan Details Page

- From the Plan Details Page, click on the “Submit Request” link Below the “Plan Admin Details” button.

Plan Details

Plan ID: 54225 **Plan Effective Date:** 06/01/1963
Plan Name: TN AMERICAS HOLDINGS, INC. DEFINED BENEFIT - ERWIN PLANT EMPLOYEES **Coverage Date:** 06/01/1983
EIN: **PN:** **Adoption Date:** N/A
Plan Status: Active **Plan Sponsor:**

[PLAN ADMIN DETAILS](#) [PLAN CONTACT DETAILS](#) 

[Create Filing](#) [Manage Roles](#) [Account History](#) [Payment Voucher](#)
[Submit Request](#) [Check Status of Request](#) [View Correspondence](#)

Premium Filings

Show entries Search:

Filing ID	PYC	Submit Date	Status			
489348	01/01/2022	10/13/2022	Submitted/Successfully Processed	FILING DETAILS	FILING RECEIPT	AMEND

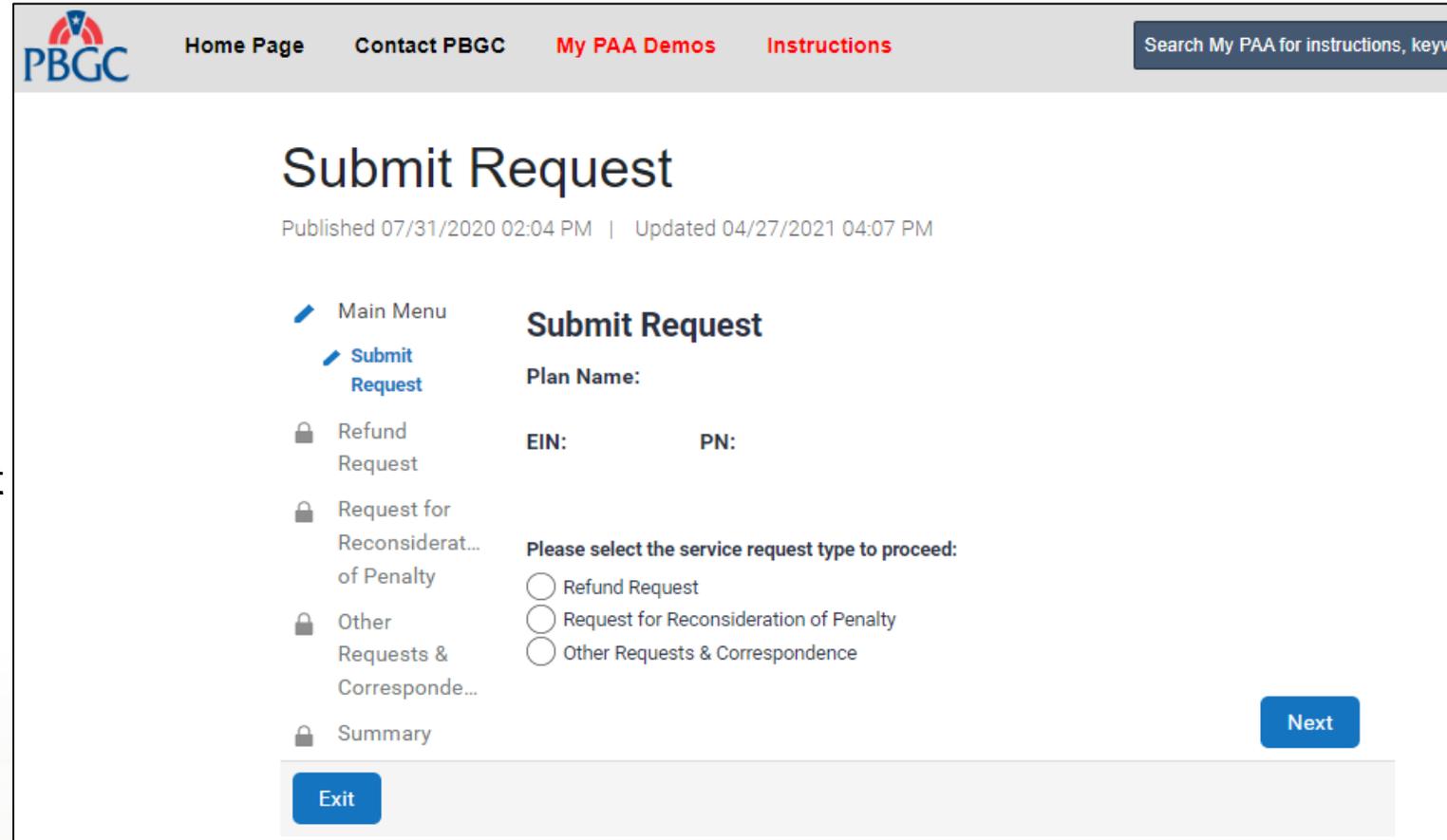
[BACK TO PLAN](#)

How to Submit a Refund Request

Submit Request Page

Submit Service Request

- Select which type of service request you would like to submit:
 - Refund Request: If you have a credit/overpayment on a particular plan year and do not wish to use it as a credit towards premium amount due for the next plan year (continue to slide 6).
 - Request for Reconsideration of Penalty: If you have received a Statement of Account (SOA), and was charged penalty, you can contest the charges (continue to slide 14).
 - Other Requests & Correspondence: If you have received correspondence from the PBGC and would like further explanation or would simply like to respond.
- Once you have selected the appropriate request, click the “Next” button.



The screenshot shows the PBGC website's 'Submit Request' page. At the top, there is a navigation bar with the PBGC logo, 'Home Page', 'Contact PBGC', 'My PAA Demos', and 'Instructions'. A search bar on the right contains the text 'Search My PAA for instructions, key...'. The main heading is 'Submit Request', with a sub-heading 'Published 07/31/2020 02:04 PM | Updated 04/27/2021 04:07 PM'. On the left, a sidebar menu lists: 'Main Menu', 'Submit Request' (highlighted in blue), 'Refund Request', 'Request for Reconsiderat... of Penalty', 'Other Requests & Corresponden...', and 'Summary'. The main content area has a 'Submit Request' heading, followed by 'Plan Name:', 'EIN:', and 'PN:'. Below this is a section titled 'Please select the service request type to proceed:' with three radio button options: 'Refund Request', 'Request for Reconsideration of Penalty', and 'Other Requests & Correspondence'. At the bottom right is a blue 'Next' button, and at the bottom left is a blue 'Exit' button.

How to Submit a Refund Request

Submit Request Page

Premium Refund Request

- Select the “Refund Request” radio button and click on the “Next” button.
- Please note that you can only request a refund as the Plan Admin/Plan Admin Rep.
 - Please see the “[How to Add/Remove and Update Roles of Filing Members](#)” demo for step-by-step instructions on updating your role.
- You will only be able to request a refund if, according to PBGC’s records there is a valid overpayment/credit available.
 - Please see the “[How to Check an Account History for a Plan](#)” demo for step-by-step instructions on how to retrieve an Account History.

PBGC Home Page Contact PBGC My PAA Demos Instructions Search My PAA for instructions, key

Submit Request

Published 07/31/2020 02:04 PM | Updated 04/27/2021 04:07 PM

- Main Menu
- Submit Request**
- Refund Request
- Request for Reconsiderat... of Penalty
- Other Requests & Correspondence
- Summary

Submit Request

Plan Name:

EIN: PN:

Please select the service request type to proceed:

- Refund Request
- Request for Reconsideration of Penalty
- Other Requests & Correspondence

Exit Next

How to Submit a Refund Request

Submit Request Page

Premium Refund Request

- My PAA will automatically display one, or all plan years that have a valid overpayment/credit.
- To request a refund for that particular plan year, check the “Request Refund” checkbox for the corresponding plan year.
- Note: You may only submit a refund request for a premium overpayment if it is within statute of limitations (i.e., non-SOL plan years).

The screenshot shows the PBGC website's 'Submit Request' page. The navigation bar includes 'Home Page', 'Contact PBGC', 'My PAA Demos', and 'Instructions'. A search bar is located in the top right corner. The main heading is 'Submit Request', with publication and update dates. A sidebar on the left contains a menu with options like 'Main Menu', 'Refund Request', 'Premium Refund Request', 'Request for Reconsideration of Penalty', 'Other Requests & Correspondence', and 'Summary'. The 'Premium Refund Request' section is active, showing fields for 'Plan Name', 'EIN', and 'PN'. Below these fields is a table of plan years with overpayment amounts and a 'Request Refund' checkbox. The first row shows a plan year of 01/01/2021 with an overpayment amount of \$15307.22. A red box highlights the 'Request Refund' checkbox, and a red arrow points to it from the 'Next' button. The 'Next' button is also highlighted with a red box. Other buttons include 'Back', 'Exit', and 'Next'.

Plan Year (PYC)	Overpayment Amount	Request Refund
01/01/2021	\$15307.22	<input type="checkbox"/>

How to Submit a Refund Request

Submit Request Page

Refund Mailing Address

- Once you have selected the appropriate plan year(s) you are requesting a refund for, please provide a valid mailing address.
 - Even if you are requesting an ACH, if the refund cannot be completed through that channel, the refund will be issued via paper check mailed to the provided address.
- After the information has been provided and validated, click on the “Next” button.

Submit Request
Published 07/31/2020 02:04 PM | Updated 04/27/2021 04:07 PM

Home Page Contact PBGC My PAA Demos Instructions Search My PAA for instructions, keywords or topics pbgctest@L...

✓ Main Menu
✓ Refund Request
✓ Premium Refund Request
✓ Refund Mailing Address
Request for Reconsiderat... of Penalty
Other Requests & Corresponden...
Summary

Refund Mailing Address

Plan Name:
EIN: PN:
Payee Name:

Please complete the following mailing address information for All refund requests. Please note that if a requested ACH refund cannot be completed (which infrequently occurs), the refund will be issued by check using this information. For additional details, click [here](#).

Please note that the Department of Treasury may reduce the amount of the refund to offset any past-due amounts you owe to another Federal agency. See 26 U.S.C. § 6402(d)(1).

Mailing Address:

Attn To:
Country
Address 1:
Address 2:
City: State: Zip:

Back Next

Exit

How to Submit a Refund Request

Submit Request Page

Premium Refund Option

- There are two available options on how you would like to receive the refund:
 - ACH (No Fed wire)
 - Paper check sent via USPS

The screenshot shows the PBGC website's 'Submit Request' page. The navigation bar includes 'Home Page', 'Contact PBGC', 'My PAA Demos', and 'Instructions', along with a search bar. The main heading is 'Submit Request', with publication and update dates. A left-hand menu lists various request types, with 'Premium Refund Option' selected and highlighted in blue. The main content area is titled 'Premium Refund Option' and contains fields for 'Plan Name:', 'EIN:', and 'PN:'. Below these is the 'Refund Option:' section with two radio button choices: 'I want a refund by ACH (No Fed wires)' and 'I want a refund by mailed check (the payee name & mailing address will be used)'. A red arrow points to the first radio button. At the bottom of the form are 'Back', 'Next', and 'Exit' buttons. The 'Next' button is highlighted with a red box.

How to Submit a Refund Request

Submit Request Page

Premium Refund Option

- If you choose to be refunded via ACH, please provide valid banking information:
 - Account Holder's Name
 - Account Type (Checking/Savings)
 - Routing Number (9-digits)
 - Account Number (at least 3-digits)
 - Is the account a trust account?
- If you choose to be refunded via paper check, the information provided on the previous screen will be used.
- Once an option is selected, click the "Next" button.

Home Page Contact PBGC My PAA Demos Instructions Search My PAA for instructions, k

Submit Request

Published 07/31/2020 02:04 PM | Updated 04/27/2021 04:07 PM

- ✓ Main Menu
- ✓ Refund Request
- ✓ Premium Refund Request
- ✓ Refund Mailing Address
- ✓ Premium Refund Option**
- Request for Reconsiderat... of Penalty
- Other Requests & Corresponden...
- Summary

Premium Refund Option

Plan Name: TN AMERICAS HOLDINGS, INC. DEFINED BENEFIT - ERWIN PLANT EMPLOYEES
EIN: 581884128 PN: 009

Refund Option:

I want a refund by ACH (No Fed wires)
 I want a refund by mailed check (the payee name & mailing address will be used)

Important: Please be sure your account does not have an "ACH Debit Block." If your account has an "ACH Debit Block", please provide the PBGC Company ID "1601000606" to your financial institution before you submit your payment so they may authorize PBGC to debit our account. Without this authorization, your financial institution may reject the processing of your payment. A Debit Block is the most common reason for failed ACH payments.

Account Holder Name:

Select Account Type: Checking Savings

Routing Number: 9 Digits

Confirm Routing Number: 9 Digits

Account Number: 3 Digit Minimum

Confirm Account Number: 3 Digit Minimum

Is this a trust account? Yes No

Back Next

Contact PBGC My PAA Demos Instructions Search My PAA for instructions, k

Submit Request

1/2020 02:04 PM | Updated 04/27/2021 04:07 PM

Premium Refund Option

Plan Name: TN AMERICAS HOLDINGS, INC. DEFINED BENEFIT - ERWIN PLANT EMPLOYEES
EIN: 581884128 PN: 009

Refund Option:

I want a refund by ACH (No Fed wires)
 I want a refund by mailed check (the payee name & mailing address will be used)

Request for Reconsiderat... of Penalty

Other Requests & Corresponden...

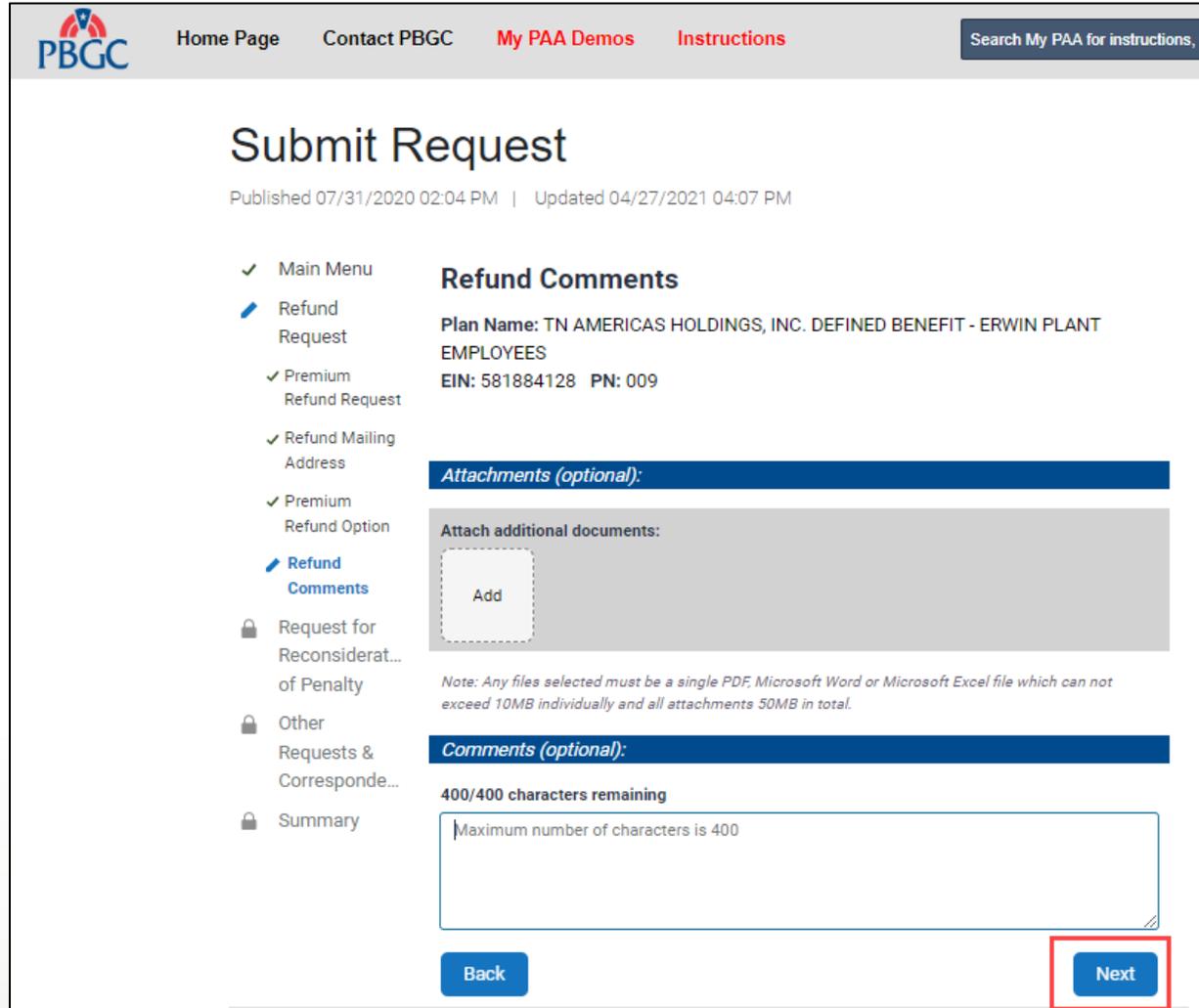
Back Next

How to Submit a Refund Request

Submit Request Page

Refund Comments

- You may also include attachments, which are optional, with your Refund Request.
 - PDF, Microsoft Word and Excel files are accepted.
 - Each file may not exceed 10MB.
 - All files total may not exceed 50MB.
- You may also include comments, which are optional, with your Refund Request.
 - Characters for the comments may not exceed the 400 limit.
- If any information has been provided, please review and validate, and then click the “Next” button.



The screenshot shows the PBGC website's "Submit Request" page. The page has a navigation bar with links for "Home Page", "Contact PBGC", "My PAA Demos", and "Instructions", along with a search bar. The main heading is "Submit Request", with a sub-heading "Refund Comments". The page displays plan information: "Plan Name: TN AMERICAS HOLDINGS, INC. DEFINED BENEFIT - ERWIN PLANT EMPLOYEES" and "EIN: 581884128 PN: 009". There are sections for "Attachments (optional)" and "Comments (optional)". The "Comments" section shows a character count of "400/400 characters remaining" and a text input field. At the bottom, there are "Back" and "Next" buttons, with the "Next" button highlighted by a red box.

Home Page Contact PBGC My PAA Demos Instructions Search My PAA for instructions.

Submit Request

Published 07/31/2020 02:04 PM | Updated 04/27/2021 04:07 PM

- ✓ Main Menu
- ✓ Refund Request
- ✓ Premium Refund Request
- ✓ Refund Mailing Address
- ✓ Premium Refund Option
- ✓ Refund Comments**
- Request for Reconsiderat... of Penalty
- Other Requests & Corresponden...
- Summary

Refund Comments

Plan Name: TN AMERICAS HOLDINGS, INC. DEFINED BENEFIT - ERWIN PLANT EMPLOYEES
EIN: 581884128 PN: 009

Attachments (optional):

Attach additional documents:

Add

Note: Any files selected must be a single PDF, Microsoft Word or Microsoft Excel file which can not exceed 10MB individually and all attachments 50MB in total.

Comments (optional):

400/400 characters remaining

Maximum number of characters is 400

Back Next

How to Submit a Refund Request

Submit Request Page

Summary - Refund Request

- Before submission, please review all the items on the Summary Page to confirm the information is valid.
- If any changes must be made, please click the “Back” button to return to the previous pages.
- If the information is correct, click the “Submit” button to send the request to PBGC.

The screenshot displays the PBGC 'Submit Request' page. At the top, there is a navigation bar with links for 'Home Page', 'Contact PBGC', 'My PAA Demos', and 'Instructions', along with a search bar. The main heading is 'Submit Request', with publication and update dates. A left-hand navigation menu lists various request types, with 'Summary - Refund Request' selected. The main content area is titled 'Summary - Refund Request' and includes a warning to review information before submission. Below this, a table shows the 'PYC & Refund Amount' for 01/01/2021 as \$15307.22. A detailed form follows, containing fields for Payee Name, Attention To, Mailing Address, Refund Method Selected, Account Holder Name, Account Type, Routing Number, Account Number, Bank Name, and Trust Account. An 'Attachment' field is currently empty. At the bottom, there is a 'Comments' field with 'N/A' and two buttons: 'Back' and 'Submit'.

PYC & Refund Amount:	
01/01/2021	\$15307.22

EIN:	581884128
PN:	009
Payee Name:	TN AMERICAS HOLDINGS, INC. DEFINED BENEFIT - ERWIN PLANT EMPLOYEES
Attention To:	John Smith
Mailing Address:	123 ABC Way Washington, DC 20005 United States (US)
Refund Method Selected:	ACH
Account Holder Name:	John Smith
Account Type:	Checking
Routing Number:	065000090
Account Number:	123
Bank Name:	CAPITAL ONE, NATIONAL ASSOCIATION
Trust Account:	No
Attachment:	
Comments:	N/A

How to Submit a Refund Request

Submit Request Page

Confirmation

- Once the request has been successfully submitted, you will be able to track the request on the “Check Status of Request” Page from the Plan Details Page.
- If you have additional comments, you may also refer to your Account Activity History.
 - Please refer to [How to Check My PAA Account Activity History](#) Demo for more information.
- You may now continue with any further premium-related task for this plan by clicking on the “Back to Plan Details” button.

The screenshot shows the PBGC website's 'Submit Request' confirmation page. At the top, there is a navigation bar with the PBGC logo, 'Home Page', 'Contact PBGC', 'My PAA Demos', and 'Instructions'. A search bar on the right contains the text 'Search My PAA for instructions, keyword...'. The main heading is 'Submit Request', with publication and update dates: 'Published 07/31/2020 02:04 PM | Updated 04/27/2021 04:07 PM'. A left-hand navigation menu lists: 'Main Menu', 'Refund Request', 'Request for Reconsiderat... of Penalty', 'Other Requests & Correspondence...', 'Summary', 'Summary - Refund Request', and 'Confirmation' (which is highlighted with a blue pencil icon). The main content area is titled 'Confirmation' and states: 'Your Premium Refund Request has been successfully submitted.' Below this, 'Plan Details' are listed: 'Payee Name: TN AMERICAS HOLDINGS, INC. DEFINED BENEFIT - ERWIN PLANT EMPLOYEES' and 'EIN/PN: 581884128/009'. Instructions follow: 'To check the status of this request click on the "Back to Plan Details" button below. Then select the "Check Status of Request" link above the premium filing section.' A final note says: 'If you have any questions about the status of this request, please send an email to pbgc_premiums@custhelp.com or call 1-800-736-2444 or 202-326-4242 and select the "premium" option. When you contact us, please reference the plan's EIN/PN shown above. Note: If you are deaf, hard of hearing, or have a speech disability, please dial 7-1-1 to access telecommunications relay services.' A blue button labeled 'Back to Plan Details' is highlighted with a red box at the bottom right of the page.