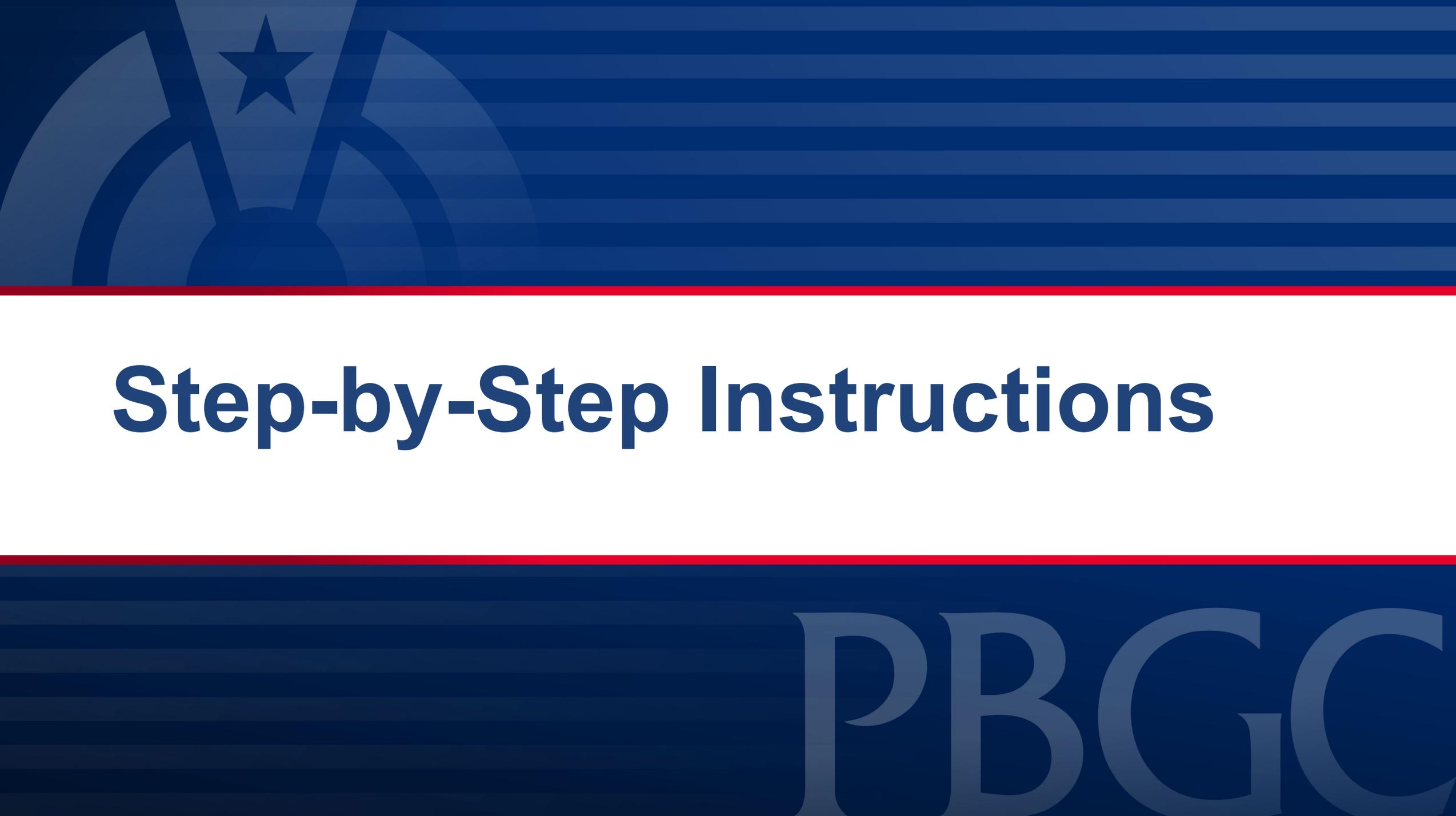


How to Submit a Request to PBGC: Refund Request

My Plan Administration Account (My PAA)

Last Updated: January 10, 2026





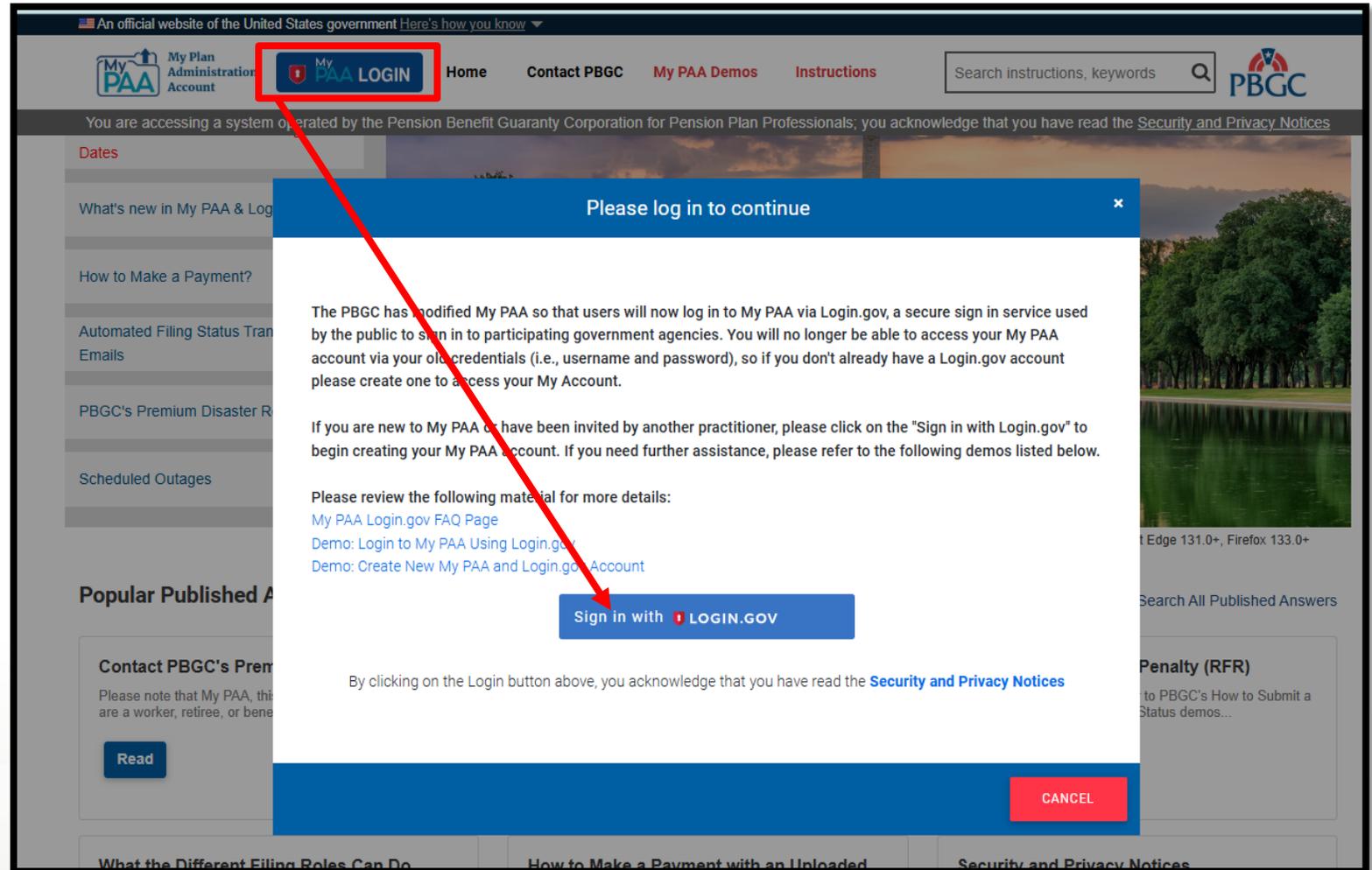
Step-by-Step Instructions

PBGC

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 My PAA website interface. At the top, there is a navigation bar with the My PAA logo, "My Plan Administration Account", and 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." Below this, it says: "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." The modal also lists links for "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, there is a blue button labeled "Sign in with LOGIN.GOV" and a red "CANCEL" button. A red arrow points from the "My PAA LOGIN" button to the "Sign in with LOGIN.GOV" button.

How to Submit a Refund Request

Plan List Page

- Once you have logged in to your My PAA account, click on the “Plan List” icon or link from the Home Page.

The screenshot displays the My PAA account dashboard. 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 message 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 red banner below this message reads: "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 sidebar on the left with "My PAA Topics" including "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". The main content area has a background image of cherry blossoms over a lake. On the right side of this image, there is a vertical menu of blue buttons: "Create New / Add Existing Plan", "Plan List" (highlighted with a red box and a red arrow), "In-Process Filings", "Upload or Import Filings", and "View Upload History". At the bottom of the page, there is a footer for "Supported Browsers: Google Chrome 124.0+, Microsoft Edge 124.0+, Firefox 125.0+ (Release 5.7 as of 04/21/2024)".

How to Submit a Refund Request

Plan Details Page

- From the Plan List page, click on the Plan Name link you wish to submit a refund request for, and then you will automatically be redirected to the Plan Details page.

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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

Plans 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 PYC	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 Submit a Refund Request

Plan Details Page

- Below the Plan Details are the premium-related action buttons. Click on the “Submit Request” button to inquire about plan information or request premium-related actions from PBGC.

[Return to Plan List](#)

Plan Details Page

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

[Create Filing](#) [Submit Request](#) [Manage Roles](#) [Payment Voucher](#) [Submit Payment](#)

[View Request Status](#) [View Correspondence](#) [Account History](#)

[Premium Filings](#) [Team Members](#) [Admin/Contact Details](#) [My PAA Payment Summary](#)

Premium Filings

The table below lists all premium filings for this Plan (EIN/PN). To navigate to the Filing Details page for a specific filing, place your cursor over the desired Filing ID and select the Filing Details button. To view/print a PDF version of your filing, select the Filing Receipt button for the appropriate row. To amend a previously submitted filing, select the Amend button for the appropriate row.

Show entries

Filing ID	PYC	Submit Date	Status	Action	View PDF
553395	01/04/2020	11/20/2024	Submitted	Amend	Filing Receipt

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.
 - Request for Reconsideration of Penalty: If you have received a Statement of Account (SOA), and was charged penalty, you can contest the charges.
 - 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.

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My Plan Administration Account

Home Contact PBGC My PAA Demos Instructions

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge

Submit Request

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

Submit Request

Plan Name: MY PAA 2.1 PROD CUT OVER CREATE TEST PLAN UPDATE
EIN: 131311313 PN: 121

Please select the service request type to proceed:

Refund Request

Request for Reconsideration of Penalty

Other Requests & Correspondence

Next

Exit

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.

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My Plan Administration Account

Home Contact PBGC My PAA Demos Instructions

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge

Submit Request

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

Submit Request

Plan Name: MY PAA 2.1 PROD CUT OVER CREATE TEST PLAN UPDATE
EIN: 131311313 PN: 121

Please select the service request type to proceed:

Refund Request

Request for Reconsideration of Penalty

Other Requests & Correspondence

Next

Exit

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).

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My PAA My Plan Administration Account Home Contact PBGC My PAA Demos Instructions

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge t

Submit Request

- ✓ Main Menu
- ✚ Refund Request
- ✚ **Premium Refund Request**
- 🔒 Request for Reconsiderat... of Penalty
- 🔒 Other Requests & Corresponden...
- 🔒 Summary

Premium Refund Request

Plan Name: MY PAA 2.1 PROD CUT OVER CREATE TEST PLAN UPDATE
EIN: 131311313 PN: 121

All plan years with a premium overpayment and within statute of limitations are listed below, per PBGC records. Please indicate for which plan years you would like to request a refund.

PYC:	Overpayment Amount:	Request Refund
02/01/2023	\$212.00	<input type="checkbox"/>
02/01/2025	\$212.00	<input checked="" type="checkbox"/>
02/01/2022	\$176.00	<input type="checkbox"/>

Back Next

Exit

How to Submit a Refund Request

Submit Request Page

Premium Refund Details

- Provide valid banking information to complete an ACH refund:
 - Account Holder's Name
 - Account Type (Checking/Savings)
 - Routing Number (9-digits)
 - Account Number (at least 3-digits)
 - Is the account a trust account?
- Once an option is selected, click the "Next" button.

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My Plan Administration Account Home Contact PBGC My PAA Demos Instructions

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge that

Submit Request

- ✓ Main Menu
- ✓ Refund Request
- ✓ Premium Refund Request
- ✓ Premium Refund Details
- Request for Reconsideration of Penalty
- Other Requests & Correspondence
- Summary

Premium Refund Details

Plan Name: SELKEN FARMS INC. CASH BALANCE PENSION PLAN
EIN: 202289231 PN: 001

In accordance with the Executive Order [Modernizing Payments To and From America's Bank Account – The White House](#), dated March 25, 2025, ACH is the only disbursement method available for premium refunds.

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).

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 refund request 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:

Confirm Routing Number:

Account Number:

Confirm Account Number:

Is this a [trust account](#)? Yes No

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.

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My PAA Administration Account Home Contact PBGC My PAA Demos Instructions Search

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge that

Submit Request

- ✓ Main Menu
- ✓ Refund Request
- ✓ Premium Refund Request
- ✓ Premium Refund Details
- ✓ Refund Comments**
- Request for Reconsideration of Penalty
- Other Requests & Correspondence
- Summary

Refund Comments

Plan Name: MY PAA 2.1 PROD CUT OVER CREATE TEST PLAN UPDATE
EIN: 131311313 PN: 121

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.

Refund Request Comments (optional):

Maximum 400 characters

Back Next

Exit

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.

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My PAA My Plan Administration Account Home Contact PBGC My PAA Demos Instructions

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge

Submit Request

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

Summary - Refund Request

Please review the information below. Navigate back and revise if necessary otherwise, please proceed with the submission of this request.
The pertinent details for this request are as follows:

EIN: 131311313
PN: 121
PYC & Refund Amount:

02/01/2025	\$212.00
------------	----------

Payee Name: MY PAA 2.1 PROD CUT
OVER CREATE TEST
PLAN UPDATE

Refund Method: 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

[Back](#) [Submit](#)

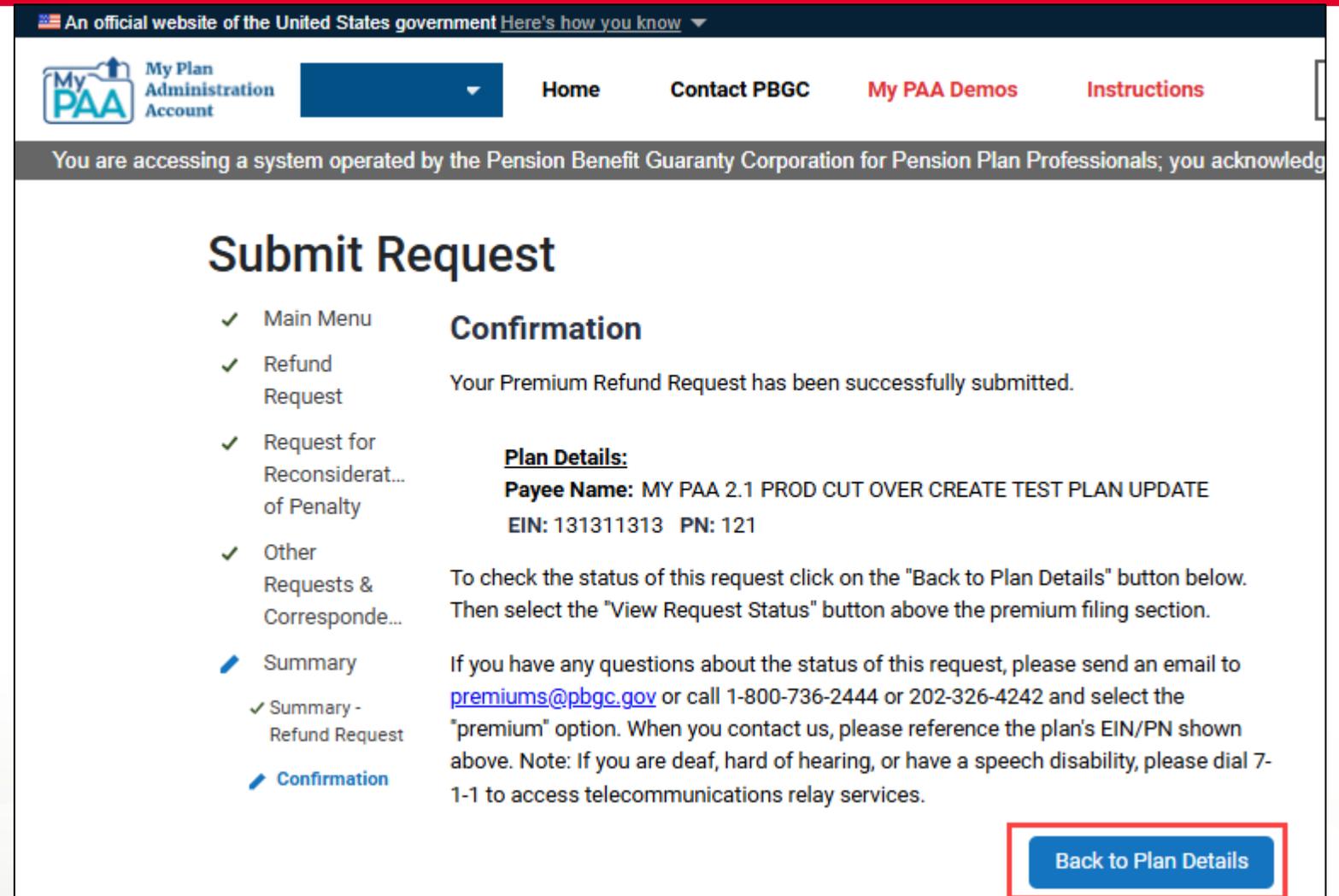
[Exit](#)

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.



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My PAA My Plan Administration Account

Home Contact PBGC My PAA Demos Instructions

You are accessing a system operated by the Pension Benefit Guaranty Corporation for Pension Plan Professionals; you acknowledge

Submit Request

- ✓ Main Menu
- ✓ Refund Request
- ✓ Request for Reconsideration of Penalty
- ✓ Other Requests & Correspondence
- ✎ Summary
- ✓ Summary - Refund Request
- ✎ **Confirmation**

Confirmation

Your Premium Refund Request has been successfully submitted.

Plan Details:
Payee Name: MY PAA 2.1 PROD CUT OVER CREATE TEST PLAN UPDATE
EIN: 131311313 **PN:** 121

To check the status of this request click on the "Back to Plan Details" button below. Then select the "View Request Status" button above the premium filing section.

If you have any questions about the status of this request, please send an email to premiums@pbgc.gov 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.

[Back to Plan Details](#)