How to Submit a Request to PBGC: Refund Request (My PAA)

Last Updated:
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How to Submit a Refund Request

Login

- From the Home Page, click on the "Log in or Sign up" button to log in.
- Enter your Username into the field labeled "username" on the My PAA login pop-up.
- Enter your Password into the field labeled "Password."
- Click on the "Log in" button.
How to Submit Other Requests & Correspondence

Plan List Page

- Once you have logged in, 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.
Plan Details Page

- Below the “PLAN ADMIN DETAILS” button, click on the “Submit Request” link.

Plan Details

- **Plan ID**: 725175
- **Plan Name**: TEST AND SERVICES PENSION PLAN
- **EIN**: 953174837  **PN**: 002
- **Plan Status**: Active
- **Plan Effective Date**: 01/01/1987
- **Coverage Date**: 01/01/1987
- **Adoption Date**: N/A
- **Plan Sponsor**: AIRBUS U.S. SPACE & DEFENSE, INC.

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How to Submit Other Requests & Correspondence
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 (continue to slide 18).

- Once you have selected the appropriate request, click the “Next” 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 View an Account History for a Plan” demo for step-by-step instructions on how to retrieve an Account History.
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 statue of limitations (i.e., non-SOL plan years)
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.
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

![Premium Refund Option](image-url)
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)
  - Bank Name

- 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.
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.
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.
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 View 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.

![Submit Request Page](image_url)