

PMRS Forms Reference Guide

Below is information on various forms and information that employers and members are required to submit to PMRS. Following this guide will assist in PMRS' efforts to effectively serve our employers and members. The most used forms are described below and are available at www.PMRS.state.pa.us. Please reach out to PMRS if you have questions or need additional information.

EMPLOYEE TERMINATION	<p>If an employee leaves the employer and is not eligible (or chooses not to) vest their retirement, the following should be submitted immediately:</p> <ul style="list-style-type: none">• Application for Return of Contributions (PMRB-4)• Lump Sum Distribution Supplement (PMRB-6), if applicable <p>Any employee contributions made by members will be returned directly to them with interest.</p> <p><i>*Note -To reduce processing time and possible administrative expense, the terminating employee should complete these forms prior to departure date.</i></p>
NEW HIRED (OR REHIRED) EMPLOYEES	<p>When a new employee becomes eligible to enroll into the pension plan, the employer and member should submit the following within 30 days following the completion of the plan's eligibility period:</p> <ul style="list-style-type: none">• Enrollment Form (PMRB-1)• Nomination of Beneficiaries (PMRB-2)
RETIRING EMPLOYEES	<p>When an employee retires, the following forms should be submitted:</p> <ul style="list-style-type: none">• Application for Retirement Benefits (PMRB-8, or PMRB-50 if the plan has a spouse's benefit)• Authorization of Direct Deposit of Annuity Payments (Direct Deposit)• Withholding Certificate for Pension or Annuity Payments (W-4P) <p><i>*Note - Members should call PMRS at least 90 days before their anticipated retirement date to obtain a benefit estimate and information on payment options. Forms cannot be submitted until after the member's final paycheck. Members should plan on retirement processing to take up to 8 - 12 weeks.</i></p>
DEMOGRAPHIC CHANGES	<p>If a member has a change of address, marital status, or leave of absence (i.e., maternity, military service), the following should be completed by the member and employer:</p> <ul style="list-style-type: none">• Notice of Demographic Change (PMRB-5a)• Notice of Service Record Change (PMRB-5b)
CONTRIBUTION CHANGE	<p>If a plan allows members to make optional contributions, members may begin or change contributions at any time. To do so, the employer and member must complete:</p> <ul style="list-style-type: none">• Voluntary Contribution Change (PMRB-15)
QUARTERLY REPORT OF CONTRIBUTIONS	<p>PMRS populates and sends a Quarterly Report of Contributions (PMRB-21) 7-10 days prior to the end of the quarter to each employer. While employers have 30 days from the end of the quarter to review and return the PMRB-21, all employer and member contributions are due to PMRS by the end of the quarter in which they are accrued.</p>

MINIMUM MUNICIPAL OBLIGATION (MMO) WORKSHEET

A pre-populated **MMO worksheet** is sent annually to all employers in August/September. A completed and signed worksheet must be returned to PMRS no later than the first week in October.

Any revisions to the MMO worksheet must be completed by December 31 of the current year. Any submissions after this date would result in an audit finding from the Auditor General's office in the event of an audit review.

SENDING MONEY TO PMRS

Funds for contributions, MMO payments and other associated plan costs can be sent via ACH, wire transfer, or check.

ACH Instructions

Bank Name: PNC Bank

Routing (ABA): No. 043000096

Account No.: 1069946309

Account Name: PENNSYLVANIA MUNICIPAL RETIREMENT SYSTEM

Wire Transfer Instructions

Bank Name: PNC Bank

Address: 500 First Avenue

Pittsburgh, PA 15219

Routing (ABA) No.: 043000096

PNC Swift No.: PNCCUS33

Account No.: 1069946309

Account Name: PENNSYLVANIA MUNICIPAL RETIREMENT SYSTEM

Checks should be sent to:

Pennsylvania Municipal Retirement System (PMRS)

PO BOX 1165, Harrisburg, PA 17108-1165

All payments made payable to the Pennsylvania Municipal Retirement System (PMRS) must be accompanied by a **Revenue Transmittal Form (PMRB-20)** to ensure accurate reconciliation of plan accounts. These should be submitted with any checks and should be emailed to ra-rscompletedforms@pa.gov when sending payments via ACH or wire transfer.

All PMRS forms can be submitted via regular mail or sent to ra-rscompletedforms@pa.gov. For additional inquiries, concerns, or information requests please call and speak with one of our Client Relations Municipal Specialists: 717-787-2065 or toll-free 1-800-622-7968.



P.O. Box 1165 | Harrisburg, PA 17108-1165
1.800.622.7968 | 717.787.2065 | 717.783.8363 fax
www.pMrs.pa.gov