

Fed Retiree Paperless 1099R Form

The Federal Government has informed all retirees that they are no longer sending out paper copies of the 1099R Form.

We believe there may be several Fed retirees at RWV who will be affected by this policy. There is something fellow residents can do to help them.

Upon finding the Federal retiree among our residents, we need to work with them to complete one of the following:

1. Ask if they have used <https://www.servicesonline.opm.gov/> to access their retirement account at OPM with their LOGIN.GOV account which became available in 2022?
 - a. If they are using LOGIN.GOV, have them sign-on with their LOGIN.GOV ID using the URL below and guide them through the online process:
<https://www.servicesonline.opm.gov/>
Once logged in, you will get a DASHBOARD. Under the column that is labeled **My Annuity**, click on **1099R Tax Form** that is half-way down the list. You will be presented with a page of 1099R tax forms.
The top most file is the most currently available 1099R.

If on Microsoft Windows, click on the 1099-R and it will open up on your screen in Adobe Acrobat Reader. You may then print a copy or save a copy into a folder on your device. Be sure to document where you placed the file so you can retrieve it at a later date if needed.

If on Apple, click on the 1099-R and the 1099-R will be sent directly to your “Downloads Folder”. Double click the file that was just downloaded into your Downloads Folder to open it for viewing, printing or saving in another folder where you can easily find it later.

Once again, ensure the downloaded 1099R file is saved to a place where you can locate it in the future.

2. If they have not used LOGIN.GOV but have been receiving email updates from OPM regarding their Federal retiree account and they have their CS claim number from OPM provided when they retired:

EITHER:

- a. **{BEST OPTION}** Assist them in getting a LOGIN.GOV ID by following the process provided by this URL (NOTE - **Login.gov passwords must be at least twelve characters**)
<https://www.opm.gov/support/retirement/how-to/how-to-login-to-services-online/>
- b. Or temporarily use their CS claim number to receive their 1099R via email once the 1099R is available. At the bottom of the screen capture below is where they could use their CS claim number to request their 1099R via the email they have on file with OPM. It is labelled 1099-R tax form.


The URL for this page is www.servicesonline.opm.gov

Manage your federal retirement annuity efficiently and securely.

Retirees and their families can manage most retirement-related needs, including:

- Annuity statements
- 1099-Rs
- Tax withholdings
- Direct deposit changes
- Contact information
- Life insurance (FEGLI) verification

[Sign in with !\[\]\(0d8db9433f46ad8f6b872612f143354f_img.jpg\) LOGIN.GOV](#)

[Login.gov help](#) 

The [Privacy Act Statement](#) applies to the information you provide to Retirement Services Online.

1099-R tax form

Use our fast, secure tool to get your current year 1099-R tax form. No login required.

[View 1099-R](#)

3. Ask if they have only been receiving Federal retiree account notifications from OPM via paper through the US Postal Service and not via email. In this case they may

never have provided their signature to consent to electronic delivery of tax documents.

- a. The information at this page explains the consent process and steps to take:

<https://www.servicesonline.opm.gov/1099-consent>

To check your 1099-R delivery method, login to your Retirement Services

Online account at the URL <https://www.servicesonline.opm.gov/>

and navigate to the “Profile” section and review the Communication

Preferences section for the 1099-R statement. You can update/change your communication preference from there.

- b. If you do not want to receive your 1099-R electronically, you may leave your Communication Preference section for the 1099-R statement checked as:

Postal Mail

Receive a paper copy of your 1099-R to your mailing address.

However, to receive your 1099-R through the Postal Mail service you

must sign on to <https://www.servicesonline.opm.gov/> with your

[LOGIN.GOV](https://www.servicesonline.opm.gov/) id and select 1099-R tax form from the list on the left. You are

Request a mailed copy

Use the [Documents module](#) to request a mailed copy of your most recent 1099-R.

Support for 1099-R

or call [1-888-767-6738](tel:1-888-767-6738) (TTY:711) for these needs:

- Requesting a duplicate form 1099-R sent to a different address than the one you have on file in your account.
- Requesting 1099-R's prior to four years ago.
- Changes or amendments to any of your tax information during the current tax year or the previous four tax years.
- General questions about your 1099-R.

When you call, please have your CSA/CSF claim number available.

Our regular business hours are from 7:40 A.M. until 5:00 P.M. (Eastern Time). You may find it easier to reach us Tuesday through Friday.

presented with a screen showing a list of your 1099-Rs that are available as well as the information listed here below that list:

If you choose the **Documents module** as noted on the screen, you need to select the option **Form 1099R request** on the next screen shown here:

Below are the available documents you can request to be viewed, printed or mailed (if available):

- How to Guides (available).
- Correspondence (**NOT** available).
- Booklet Request (available).
- Digital Booklets (available).
- Form 1099R Request (available).
- Annual Notice of Annuity (available).
- Annual Summary of Payments (available).
- Disability Earnings Report (**NOT** available).

How to Guides

Booklet Request

Digital Booklets

Form 1099R Request

Annual Notice of Annuity

Annual Summary of Payments

Once you select that option you will be presented with a pop-up screen as shown below.

Request for 1099R

You can request an electronic copy of your most recent Form 1099R to print or save to your device. If you do not have the capability of printing or viewing your Form 1099R on your device, you can also request that a duplicate Form 1099R be mailed to your correspondence address on file.

If you want a duplicate form 1099-R sent to a different address or if you have questions about your 1099-R, contact our Retirement Information Office for further information. Our nationwide toll-free number is 1 (888)767-6738. When you call, please have your CSA/CSF claim number available; it will speed up your call.

Select the corresponding button below to generate the Form 1099R for viewing, saving, or printing or to request that a duplicate be mailed to you instead.

Are you sure you want to request a duplicate 1099R? If yes, click "Mail 1099R" below or click Close to do nothing.

Mail 1099R

Download 1099R

Close

If you want your 1099-R mailed to you choose the button labelled Mail 1099-R.

So OPM is allowing you to continue to receive your 1099-R via postal mail but it seems that you are being required to DO SOMETHING to ensure OPM sends it to you.

- c. If you wish to speak with someone you may call the OPM phone number for Retirement Services which is 1-888-767-6738 (TTY: 711) ensuring you have your CS claim number and your birthdate handy as both will be needed when contacting OPM via phone.
 - i. [NOTE: If you receive a message when calling the phone number that tells you they are receiving a high volume of calls, follow the instructions to go to the website OPM.GOV/RSO which takes you to the <https://www.servicesonline.opm.gov/> screen where you would need to login with your LOGIN.GOV ID or create a LOGIN.GOV ID if you do not already have one. Once you have done this successfully and have logged in with your new LOGIN.GOV ID, you will be able to use the OPM self service options which is the BEST option of all.
 - ii. If someone does answer the phone:
 - 1. Request the 1099R be sent via paper if possible
 - 2. If the 1099R cannot be sent via regular mail and the retiree has an email account, ask if your email account can be added to your OPM retiree account.