

1. Purpose of Document

This job-aid will guide you to:

- Display and Print IRS Form 1099-R.

2. Systems and Applications

The system required for this procedure is:

- **Retiree Self Services (RSS)**

3. Intended Audience

The following roles will use this Job Aid:

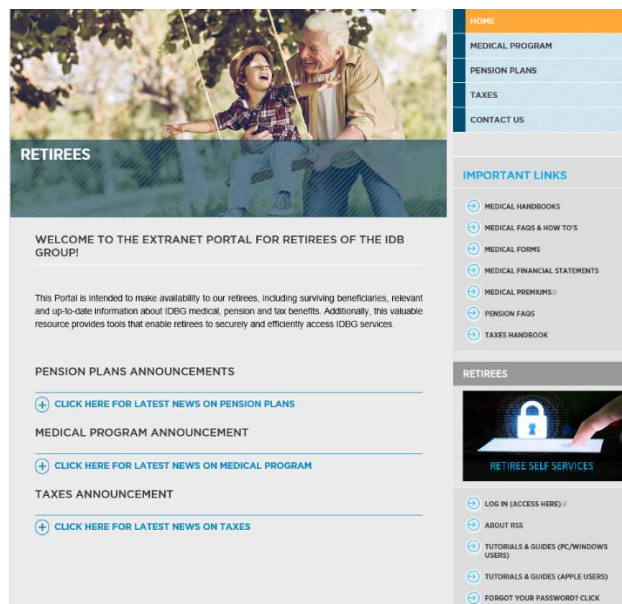
- U.S. Tax Residents Retirees

4. Procedure

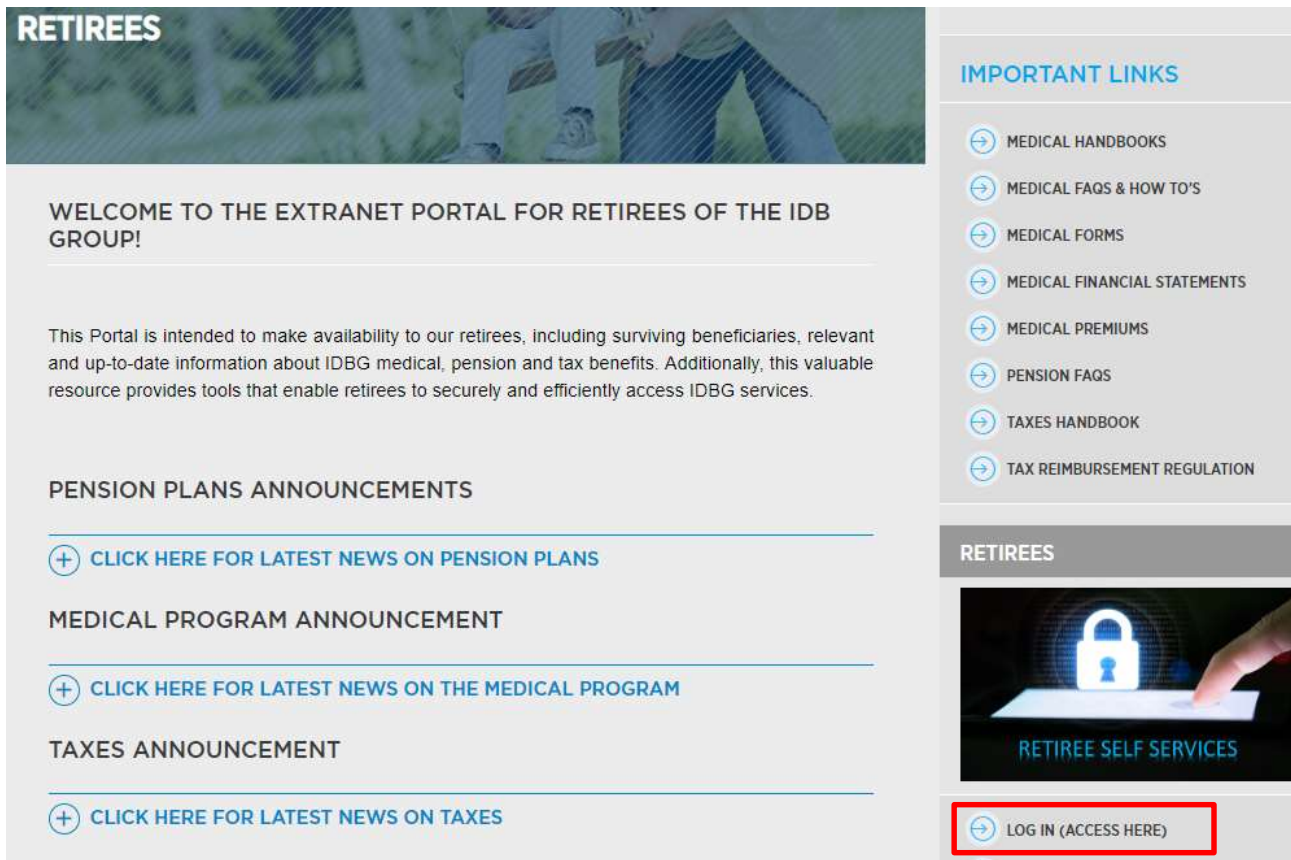
4.1 Visit the Extranet Portal for Retirees of the IDB Group:

English version: <https://www.iadb.org/retirees>

Spanish version: <https://www.iadb.org/es/retirees/jubilados>



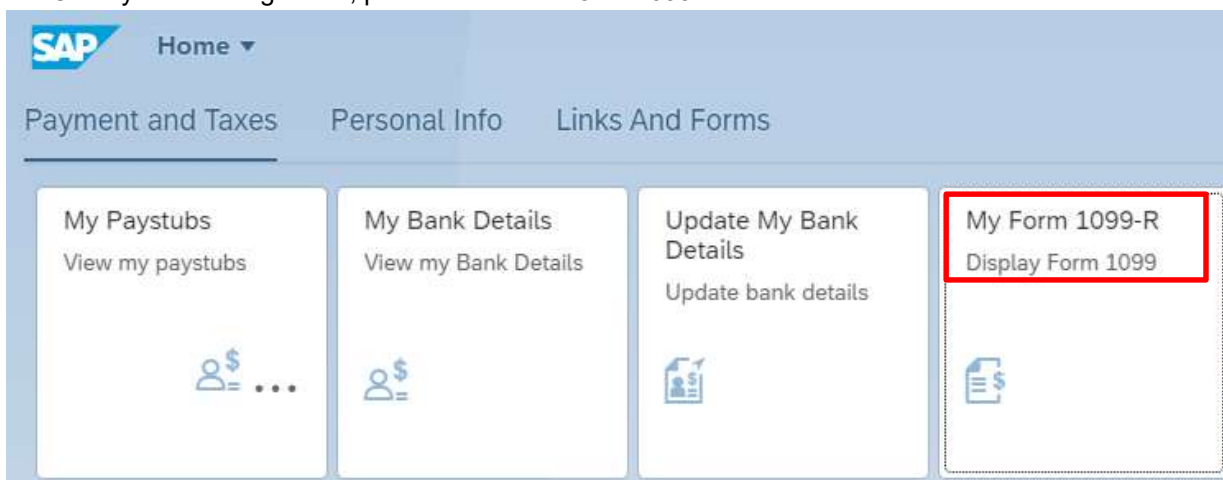
4.2. Click “**Log In (Access Here)**” located in the RSS menu on the lower right-hand side of the page. **You will need to have an active account to be able to Log into RSS.** You can find the Instructions to Activate your account and access the system for the first time [here](#).



The screenshot shows the IDB Retirees Extranet Portal. The main heading is "RETIREES". Below it, a welcome message reads: "WELCOME TO THE EXTRANET PORTAL FOR RETIREES OF THE IDB GROUP!". A paragraph explains the portal's purpose: "This Portal is intended to make availability to our retirees, including surviving beneficiaries, relevant and up-to-date information about IDBG medical, pension and tax benefits. Additionally, this valuable resource provides tools that enable retirees to securely and efficiently access IDBG services." There are three announcement sections: "PENSION PLANS ANNOUNCEMENTS" with a link "+ CLICK HERE FOR LATEST NEWS ON PENSION PLANS", "MEDICAL PROGRAM ANNOUNCEMENT" with a link "+ CLICK HERE FOR LATEST NEWS ON THE MEDICAL PROGRAM", and "TAXES ANNOUNCEMENT" with a link "+ CLICK HERE FOR LATEST NEWS ON TAXES". On the right side, there is an "IMPORTANT LINKS" menu with items: "MEDICAL HANDBOOKS", "MEDICAL FAQS & HOW TO'S", "MEDICAL FORMS", "MEDICAL FINANCIAL STATEMENTS", "MEDICAL PREMIUMS", "PENSION FAQS", "TAXES HANDBOOK", and "TAX REIMBURSEMENT REGULATION". Below this menu is a "RETIREES" section with a graphic of a hand pointing to a padlock icon and the text "RETIREE SELF SERVICES". At the bottom right, a "LOG IN (ACCESS HERE)" button is highlighted with a red box.

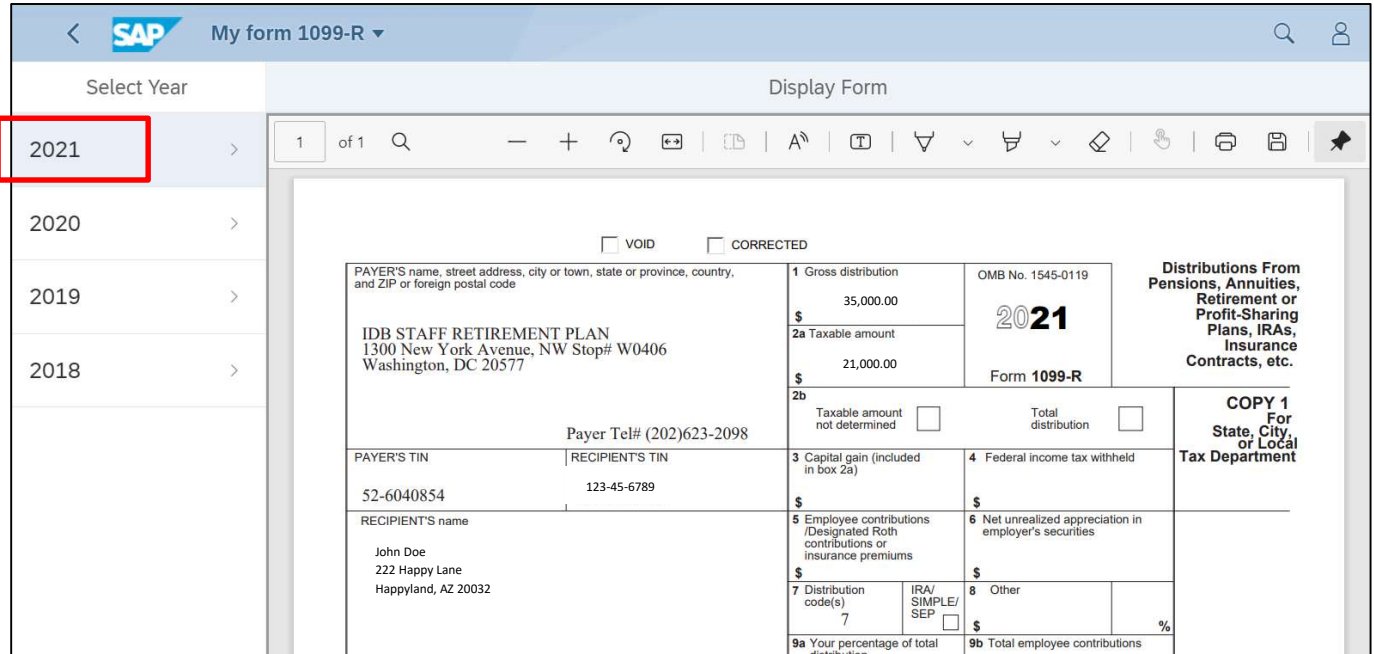
4.3 After clicking on “Log in (Access here)”, you will be directed to **Sign In Page**. **For detailed instructions on how to Access your account for the Retiree Self-Services Portal** [click here](#).

4.4 Once you have Signed In, please click on “**Form 1099-R**”.



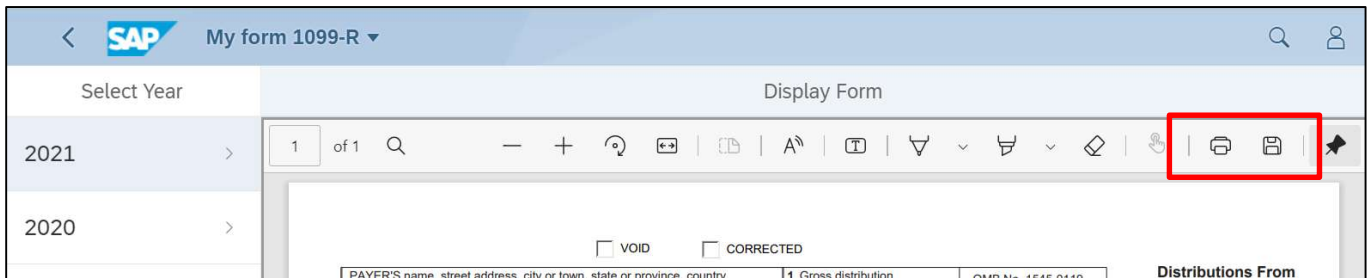
The screenshot shows the SAP Retiree Self-Services Portal. The top navigation bar includes the SAP logo, a "Home" dropdown, and three main menu items: "Payment and Taxes", "Personal Info", and "Links And Forms". Below the navigation bar, there are four service tiles. The first tile is "My Paystubs" with the subtext "View my paystubs" and an icon of a person with a dollar sign and three dots. The second tile is "My Bank Details" with the subtext "View my Bank Details" and an icon of a person with a dollar sign. The third tile is "Update My Bank Details" with the subtext "Update bank details" and an icon of a document with a dollar sign. The fourth tile is "My Form 1099-R" with the subtext "Display Form 1099" and an icon of a document with a dollar sign. This fourth tile is highlighted with a red box.

4.5 Select the Year to display your form 1099-R.



The screenshot shows the SAP 'My form 1099-R' interface. On the left, a 'Select Year' dropdown menu is open, with '2021' selected and highlighted by a red box. The main area displays the 'Display Form' for 2021. The form includes fields for Payer's name (IDB STAFF RETIREMENT PLAN), Payer's TIN (52-6040854), Recipient's name (John Doe), and various distribution amounts. The year '2021' is prominently displayed in the center of the form.

4.6 You may print or download the form, by using the icons on the top right of the form.



This screenshot shows the same SAP interface as above, but with the top right toolbar highlighted by a red box. The toolbar contains icons for print, download, and other actions. The '2021' year is still selected in the dropdown menu.

Results

You have viewed the steps to display the IRS Form 1099-R in RSS.

Support

If you are unable to perform any of the Retiree Self-Service actions listed above, please contact the [Pensions Service Center](#) via email with the description of the issue and screenshots if possible.

Email: pensions@iadb.org
 Phone : 202-312-4420

For questions related to your 1099 form, please contact TaxConsultants@iadb.org

