

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:

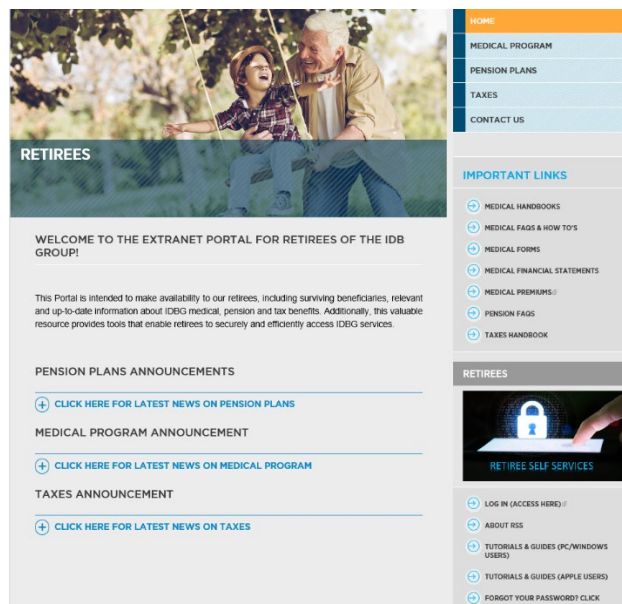
- U.S. Tax Residents Retirees

4. Procedure

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

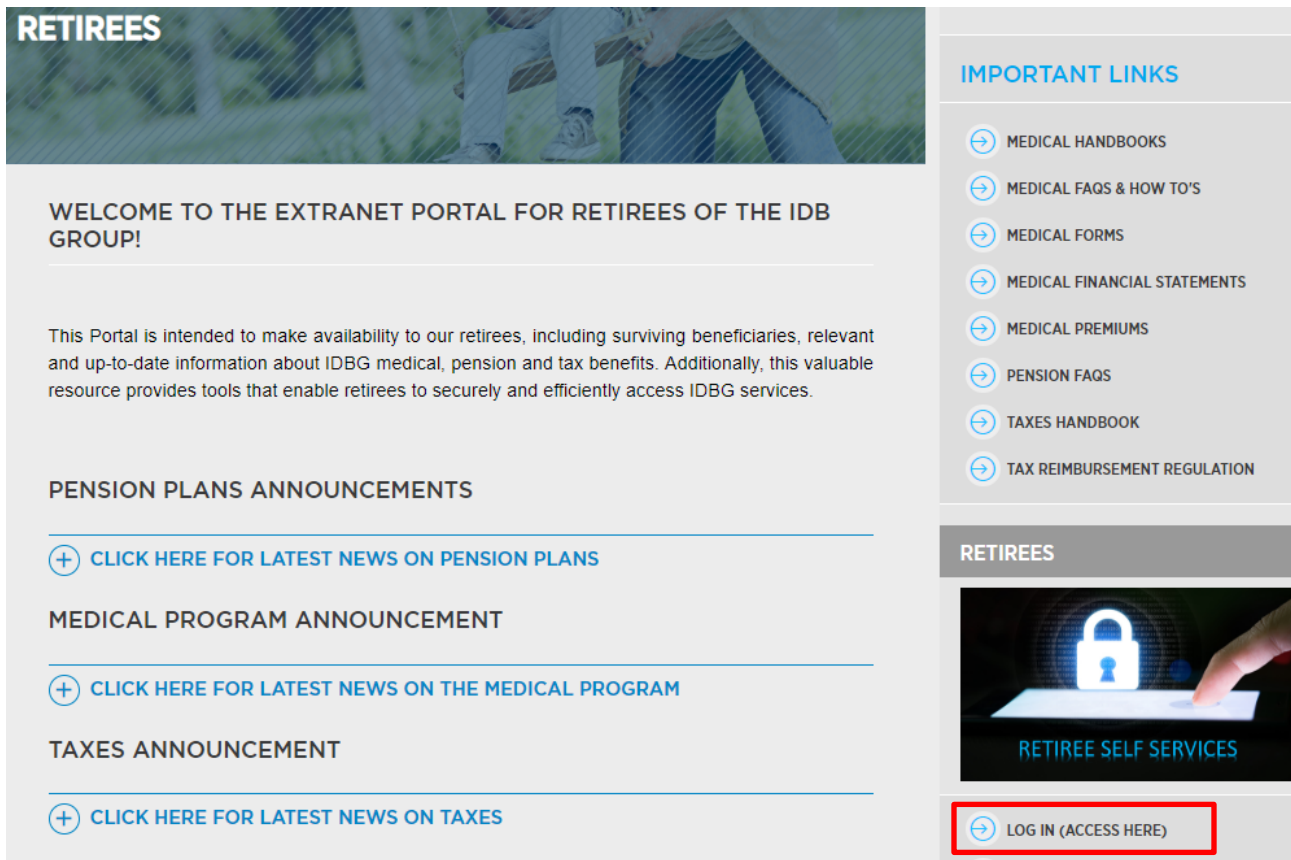
English version: <https://www.iadb.org/retirees>

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



The screenshot displays the IDB Retirees Extranet Portal. The main content area features a header image of an elderly couple, followed by a 'RETIREES' section with a welcome message and a brief description of the portal's purpose. Below this, there are three announcement sections: 'PENSION PLANS ANNOUNCEMENTS', 'MEDICAL PROGRAM ANNOUNCEMENT', and 'TAXES ANNOUNCEMENT', each with a 'CLICK HERE FOR LATEST NEWS' link. The right sidebar contains a navigation menu with 'HOME', 'MEDICAL PROGRAM', 'PENSION PLANS', 'TAXES', and 'CONTACT US'. Below the menu is an 'IMPORTANT LINKS' section with links to 'MEDICAL HANDBOOKS', 'MEDICAL FAGS & HOW TO'S', 'MEDICAL FORMS', 'MEDICAL FINANCIAL STATEMENTS', 'MEDICAL PREMIUMS', 'PENSION FAGS', and 'TAXES HANDBOOK'. At the bottom of the sidebar, there is a 'RETIREES' section with a 'RETIREE SELF SERVICES' button and a list of links: 'LOG IN (ACCESS HERE)', 'ABOUT RSS', 'TUTORIALS & GUIDES (PC/WINDOWS USERS)', 'TUTORIALS & GUIDES (APPLE USERS)', and 'FORGOT YOUR PASSWORD? CLICK HERE'.

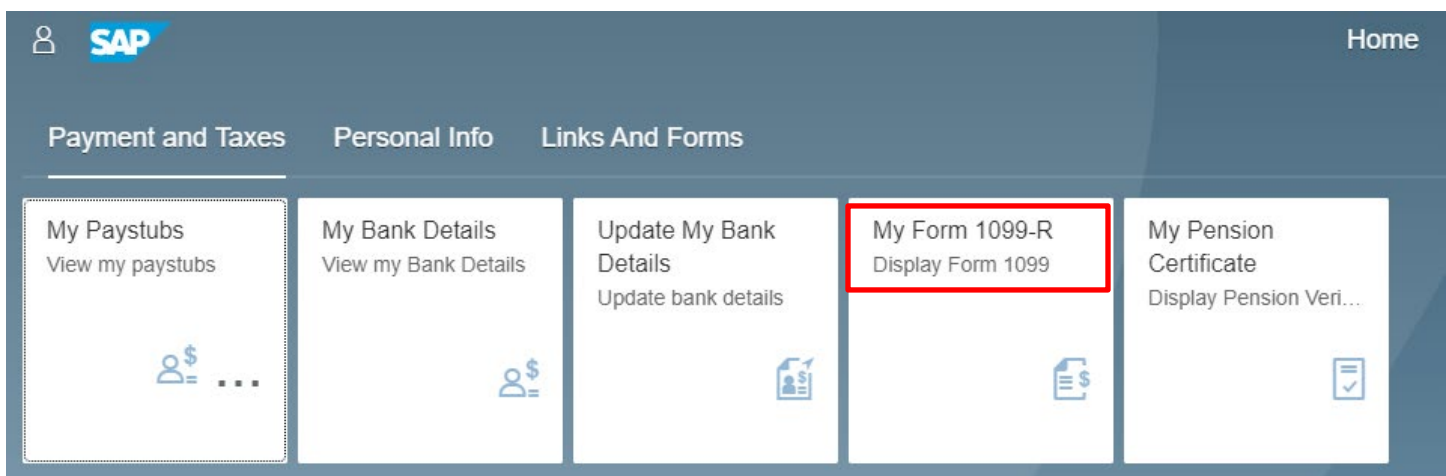
4.2. Click “**Log In (Access Here)**” located in the RSS menu on the lower right-hand side of the page. **You will need to have an active account to be able to Log into RSS.** You can find the Instructions to Activate your account and access the system for the first time [here](#).



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 screen labeled "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 a user icon, the SAP logo, and a "Home" link. Below the navigation bar are three tabs: "Payment and Taxes", "Personal Info", and "Links And Forms". The main content area displays five tiles: "My Paystubs" (View my paystubs), "My Bank Details" (View my Bank Details), "Update My Bank Details" (Update bank details), "My Form 1099-R" (Display Form 1099), and "My Pension Certificate" (Display Pension Veri...). The "My Form 1099-R" tile is highlighted with a red box.

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

My form 1099-R ▾

Select Year

2020 >

2019 >

2018 >

1099Form 1 / 1

Display Form

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code

IDB STAFF RETIREMENT PLAN
1300 New York Avenue, NW Stop# W0406
Washington, DC 20577

Payer Tel# (202)623-2098

PAYER'S Federal Identification number: 52-6040854

RECIPIENT'S Identification number: 123-45-7890

RECIPIENT'S name, street address (including apt no.), city or town, state or province, country, and ZIP or foreign postal code

John Doe
222 Happy Lane
Happyland, AZ 20032

1 Gross distribution: \$ 35,000.00

2a Taxable amount: \$ 21,000.00

2b Taxable amount not determined: Total distribution:

3 Capital gain (included in box 2a): \$

4 Federal income tax withheld: \$

5 Employee contributions / Designated Roth contributions or insurance premiums: \$

6 Net unrealized appreciation in employer's securities: \$

7 Distribution code(s): 7 IRA/SIMPLE/SEP:

8 Other: \$ %

9a Your percentage of total distribution: %

9b Total employee contributions: \$

10 Amount allocable to IRR within 5 years: \$

11 1st year of desig. Roth contrib.: FATCA filing requirement:

12 State tax withheld: \$

13 State/Payer's state no.: \$

14 State distribution: \$

OMB No. 1545-0119

2020

Form 1099-R

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

COPY 1 For State, City, or Local Tax Department

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

My form 1099-R ▾

Select Year

2020 >

2019 >

2018 >

1099Form 1 / 1

Display Form

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OMB No. 1545-0119

2020

Form 1099-R

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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 form 1099-R, please contact TaxConsultants@iadb.org

