

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:

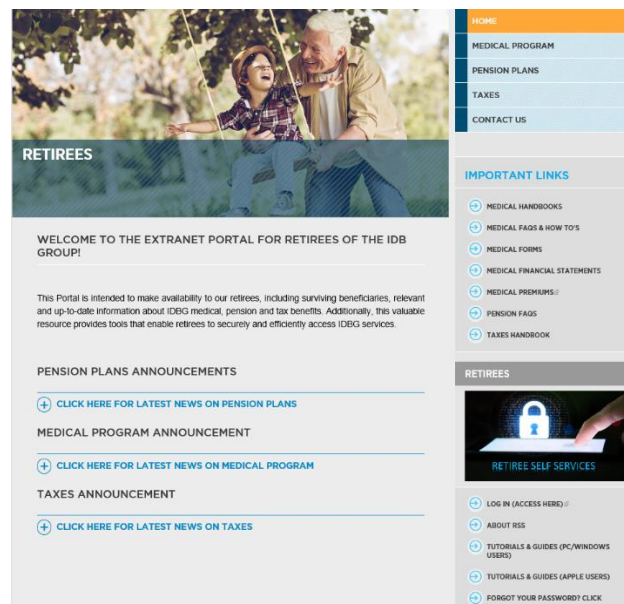
- U.S. Tax Residents Retirees

4. Procedure

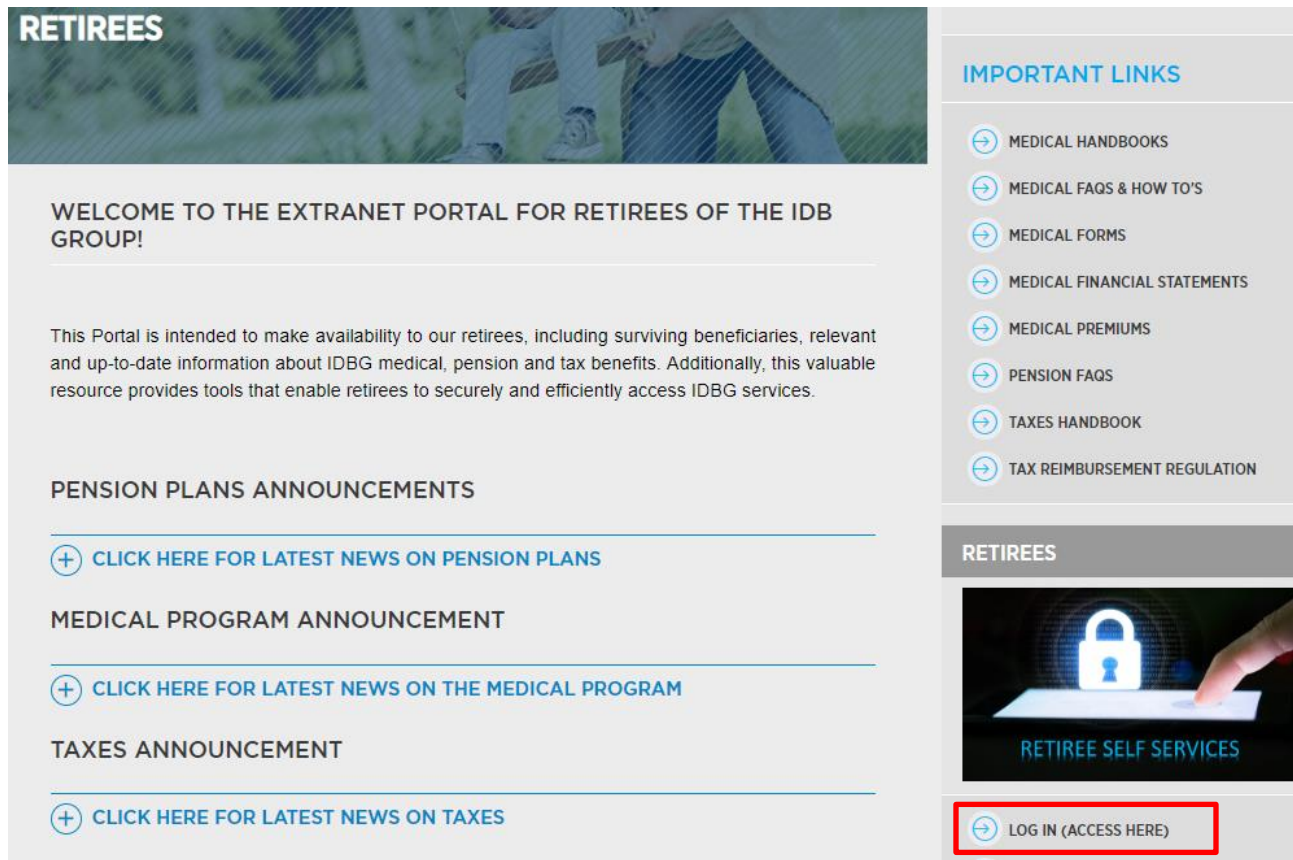
4.1 Visit the Extranet Portal for Retirees of the IDB Group:

URL for English version: <https://www.iadb.org/en/retirees/home,17924.html>;

URL for Spanish version: <https://www.iadb.org/es/retirees/home%2C17924.html>

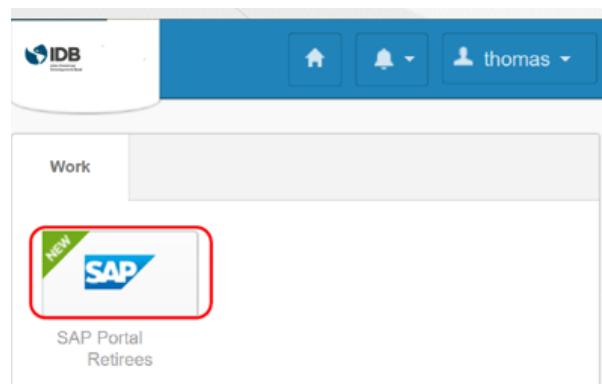


4.2. Click “**Log In (Access Here)**” located in the RSS menu on the lower right hand side of the page. You will need to have an active account to be able to Log into RSS. To activate your account please follow the Instructions to [Activate your account and access the system for the first time](#).

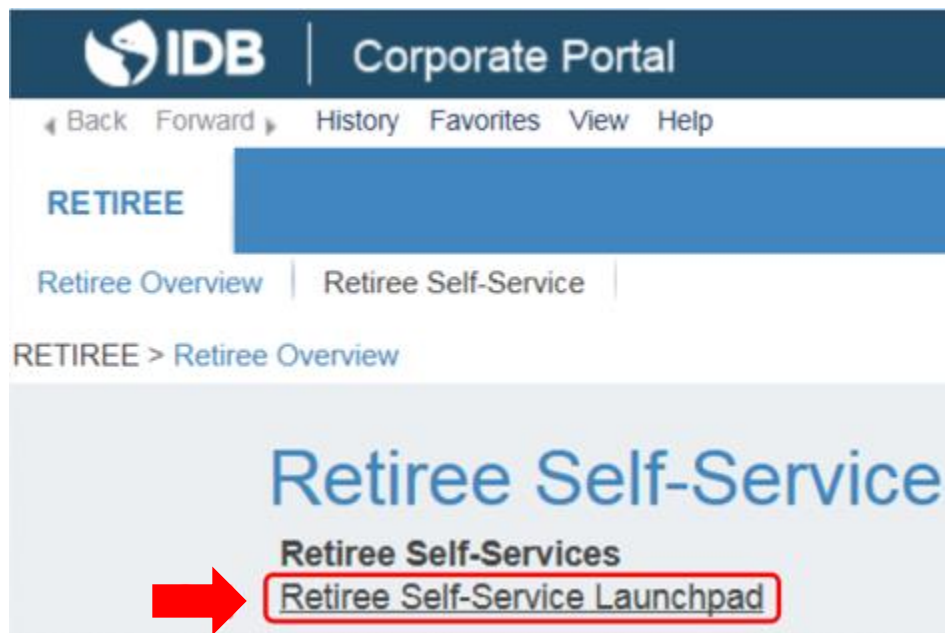


The screenshot shows the IDB Retirees Extranet Portal. At the top left, there is a header with the word "RETIRES" over a background image of people. Below this, a welcome message reads: "WELCOME TO THE EXTRANET PORTAL FOR RETIREES OF THE IDB GROUP!". A paragraph follows, stating the portal's purpose for retirees and beneficiaries. Below this are three sections: "PENSION PLANS ANNOUNCEMENTS", "MEDICAL PROGRAM ANNOUNCEMENT", and "TAXES ANNOUNCEMENT", each with a link to the latest news. On the right side, there is a sidebar titled "IMPORTANT LINKS" with a list of resources including Medical Handbooks, FAQs, Forms, Financial Statements, Premiums, Pension FAQs, Taxes Handbook, and Tax Reimbursement Regulation. Below the sidebar, there is a "RETIRES" section with a graphic of a hand using a tablet and the text "RETIREE SELF SERVICES". At the bottom right, a "LOG IN (ACCESS HERE)" button is highlighted with a red rectangle.

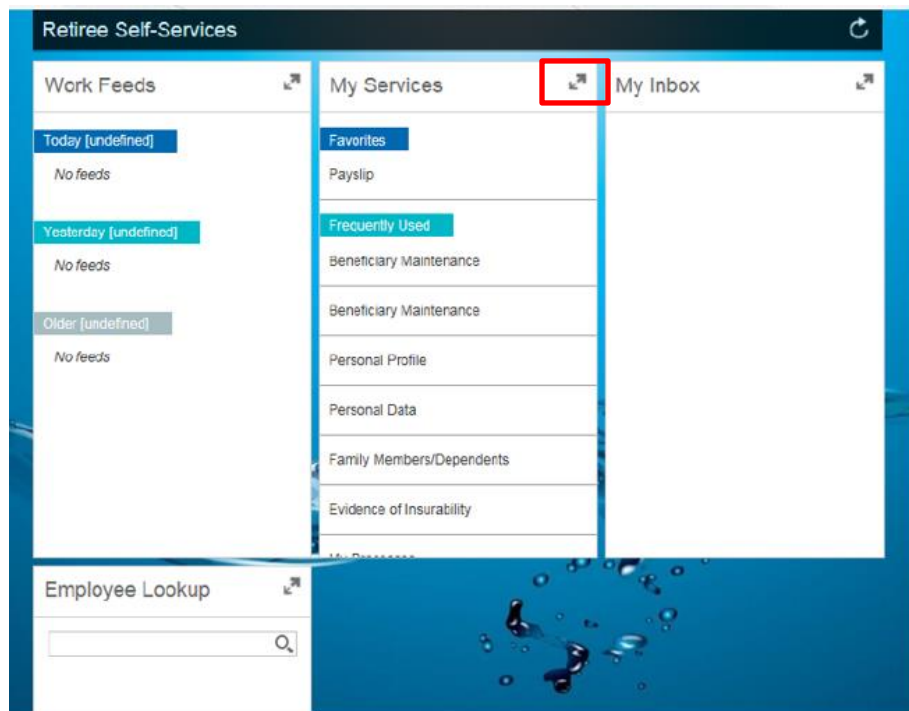
4.3 After you press Log in (Access here) you will be directed to **Sign In** Page. For detail instructions on how to Access your account for the Retiree Self-Services Portal please [click here](#). Once you have Signed In please select the SAP Portal Retirees.



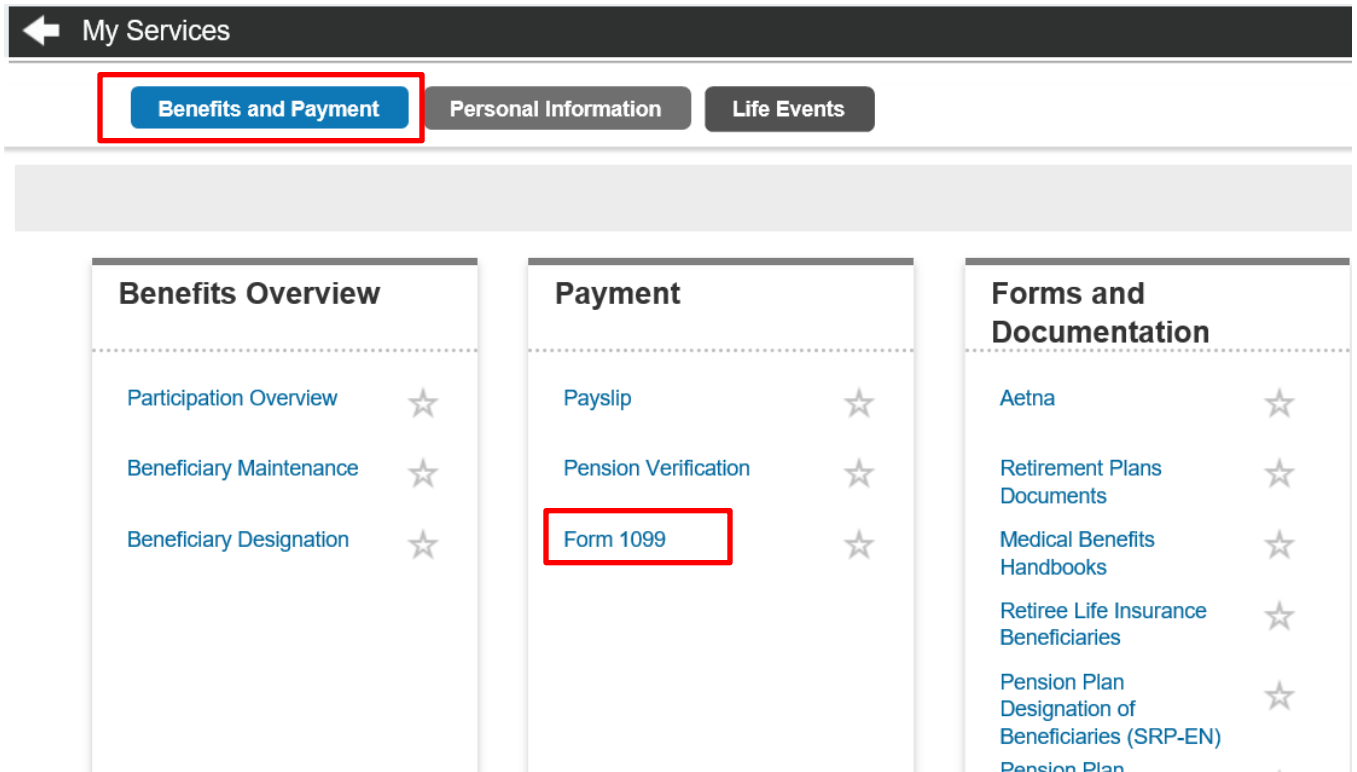
4.4 The SAP Portal will be displayed. Please press **Retiree Self-Service Launchpad**.



4.5 The Retiree Self Services Main Page will be displayed. Click "My Services".



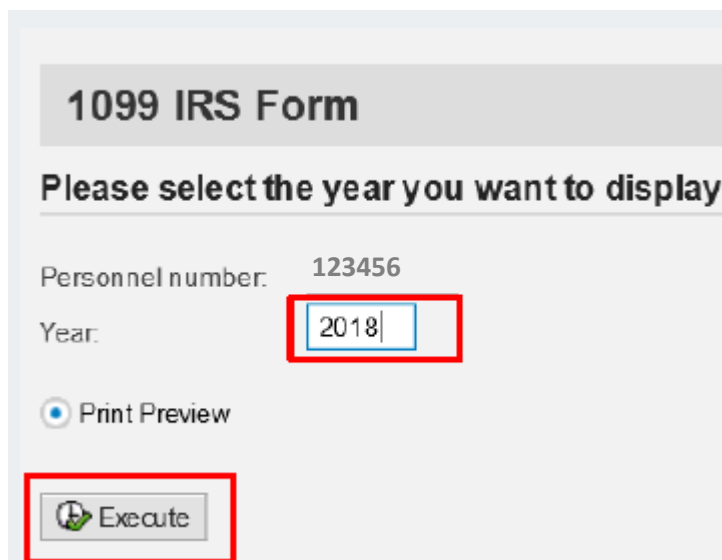
4.6 Click “Benefits and Payment” and “Form 1099”



← My Services

Benefits and Payment Personal Information Life Events

Benefits Overview	Payment	Forms and Documentation
Participation Overview ☆	Payslip ☆	Aetna ☆
Beneficiary Maintenance ☆	Pension Verification ☆	Retirement Plans Documents ☆
Beneficiary Designation ☆	Form 1099 ☆	Medical Benefits Handbooks ☆
		Retiree Life Insurance Beneficiaries ☆
		Pension Plan Designation of Beneficiaries (SRP-EN) ☆
		Pension Plan ☆

4.7 The **Selection Criteria** for IRS Form 1099-R will be displayed. You will need to enter the Year for which you would like to generate the form. Click on **Execute** button to generate the form.

1099 IRS Form

Please select the year you want to display

Personnel number: 123456

Year: 2018

☒ Print Preview

4.8 The Form 1099-R will be displayed. You may print the form or save it in PDF format.

☐ 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 <div style="text-align: right;">Payer Tel# (202)623-2098</div>		1 Gross distribution <div style="text-align: right;">\$ 45,380.00</div>	OMB No. 1545-0119 <div style="font-size: 2em; font-weight: bold;">2018</div>	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
2a Taxable amount <div style="text-align: right;">\$ 39,900.00</div>		Form 1099-R		
PAYER'S Federal Identification number 52-6040854		RECIPIENT'S Identification number 123-45-6789		COPY 1 For State, City, or Local Tax Department
RECIPIENT'S name, street address (including apt no.), city or town, state or province, country, and ZIP or foreign postal code Jane Doe 1245 Happy Lane Wonderland, AZ 10506		3 Capital gain (included in box 2a) <div style="text-align: right;">\$</div>	4 Federal income tax withheld <div style="text-align: right;">\$</div>	
5 Employee contributions /Designated Roth contributions or insurance premiums <div style="text-align: right;">\$</div>		6 Net unrealized appreciation in employer's securities <div style="text-align: right;">\$</div>		
7 Distribution code(s) <div style="text-align: center;">7</div>		IRA/ SIMPLE/ SEP <input type="checkbox"/>	8 Other <div style="text-align: right;">\$ %</div>	
9a Your percentage of total distribution		9b Total employee contributions		

Issues displaying the 1099-R in RSS



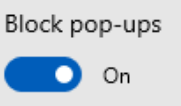
In case that you click on the *Form 1099-R* option (once, left click) and nothing happens, check on your browser for the pop-up windows to be allowed.

To see blocked pop-ups for a site, follow the steps listed below:


If you are using Chrome

1. If pop-ups have been blocked, you'll see the  icon in the address bar. Click the icon to see a list of the blocked pop-ups.
2. To always see pop-ups for the site, select "Always show pop-ups from [site]." Then click on the "Done" button
3. Refresh the page by pressing F5
4. If the page displays a message click continue.
5. Proceed from step 4.5 from attached job aid.

If you are using Edge

1. Click on the  icon located on the top right corner of your screen (below the close X) 
2. A menu will open, choose *Settings* from the bottom of the list
3. Then, look for the option *Advanced Settings* and click on the button *View advanced settings*
4. Locate the option Block pop-ups (which will be *On* ) and turn it *off*. You can turn it on for other websites.
5. Proceed from step 4.5 from attached job aid.

If you are using Firefox

1. Click the "hamburger" menu icon  (top right) to open the Firefox menu.
2. Click Options.
3. Click the Content icon located at the top of the window.
4. Make sure that Block pop-up windows is activated (checkbox).
5. Click the Exceptions button located to the right of Block pop-up windows.
6. You will see the Allowed Sites dialog box.
7. To enable the browser to recognize IDB Retiree Self-Service as trusted site and, therefore, enable pop-ups from these sites, in the Address of web site field, type the site's URL. Type: **portalsap.iadb.org**
8. Repeat the previous step to add other IDB trusted sites, including:
 - o **idbg.okta.com**
 - o **iadb.org**
9. Click Close when you finish adding the sites you want.
10. Click OK to close the Options dialog box.
11. Proceed from step 4.5 from attached job aid.

**If you are using Safari :**

1. Click on *Safari* on the top left corner of your screen
2. Click on *Preferences*

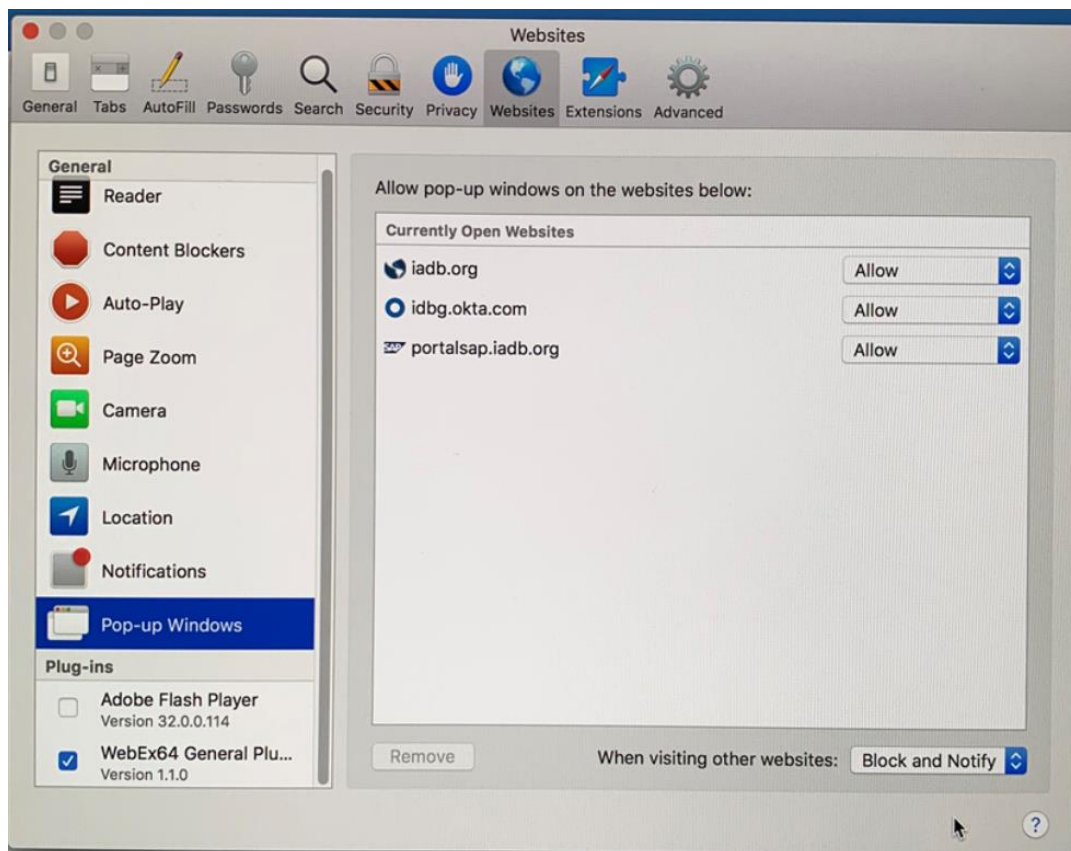
3. A new window will open, click on the *websites* icon from the top row



4. Then, below, on the left column choose the *Pop-up windows* option



5. Next, on the right side, set these sites as *Allow*: **iadb.org**, **idbg.okta.com**, **portalsap.iadb.org** see below image as example:



6. Close this window
7. Proceed from step 4.5 from attached job aid.

Results

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

Extranet Support

If you are unable to perform any of the self-service actions listed below, please contact [Extranet Support](#) via email with the description of the issue and screenshots.

- Have not received account activation email.
- Activation link is not working.
- Unable to register the account.
- Unable to access the retiree self-services.
- Unable to reset the password.
- Forgot the password challenge.
- Unable to receive the passcode on the cell phone via Text Message.
- Unable to receive the passcode on the cell phone/ fixed line phone via Voice Call.
- Unable to unlock the account.

Email: ExtranetSupport@iadb.org

Phone : 202-312-4420

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