

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:

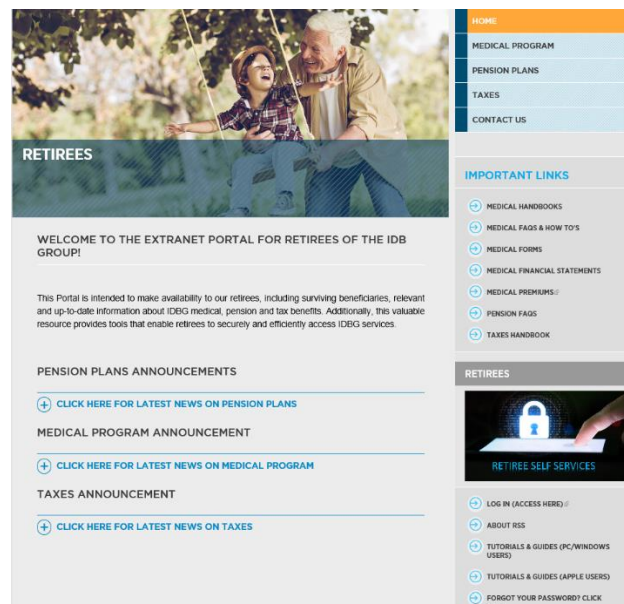
- U.S. Tax Residents Retirees

4. Procedure

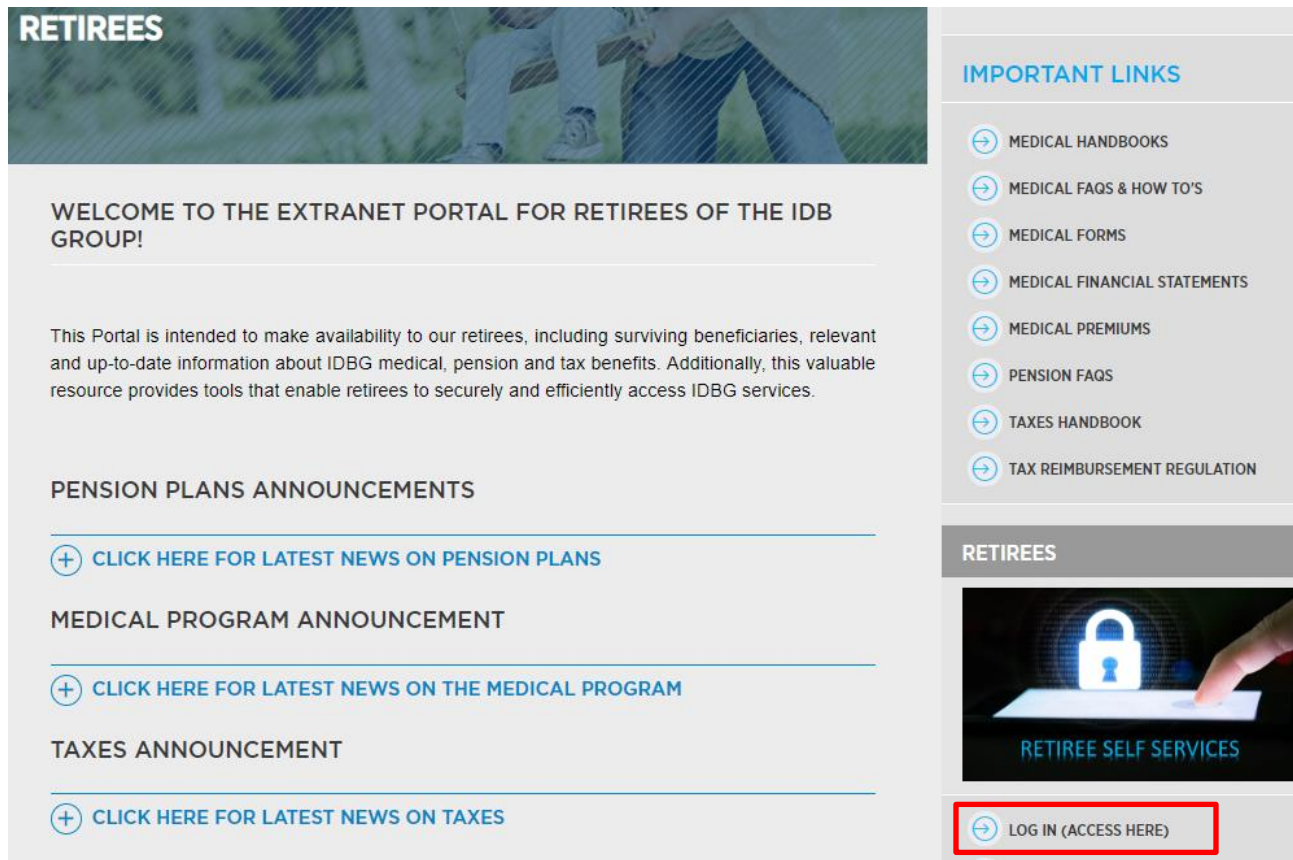
4.1 Visit the Extranet Portal for Retirees of the IDB Group:

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 'RETIREES' section of the IDB Extranet Portal. It features a welcome message, a description of the portal's purpose, and links for pension plans, medical programs, and taxes. On the right, there is a sidebar with 'IMPORTANT LINKS' and a 'RETIREES' section containing a 'LOG IN (ACCESS HERE)' button, which is highlighted with a red rectangle.

RETIREES

WELCOME TO THE EXTRANET PORTAL FOR RETIREES OF THE IDB GROUP!

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.

PENSION PLANS ANNOUNCEMENTS

[CLICK HERE FOR LATEST NEWS ON PENSION PLANS](#)

MEDICAL PROGRAM ANNOUNCEMENT

[CLICK HERE FOR LATEST NEWS ON THE MEDICAL PROGRAM](#)

TAXES ANNOUNCEMENT

[CLICK HERE FOR LATEST NEWS ON TAXES](#)

IMPORTANT LINKS

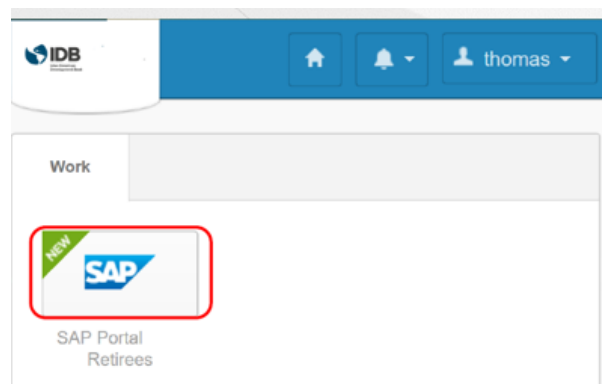
- MEDICAL HANDBOOKS
- MEDICAL FAQS & HOW TO'S
- MEDICAL FORMS
- MEDICAL FINANCIAL STATEMENTS
- MEDICAL PREMIUMS
- PENSION FAQS
- TAXES HANDBOOK
- TAX REIMBURSEMENT REGULATION

RETIREES

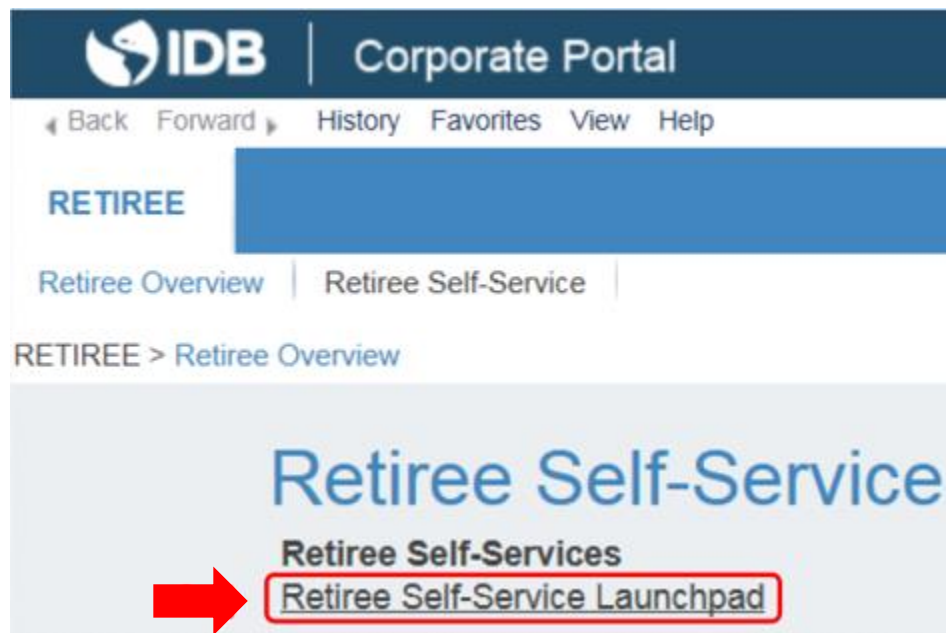
RETIREE SELF SERVICES

[LOG IN \(ACCESS HERE\)](#)

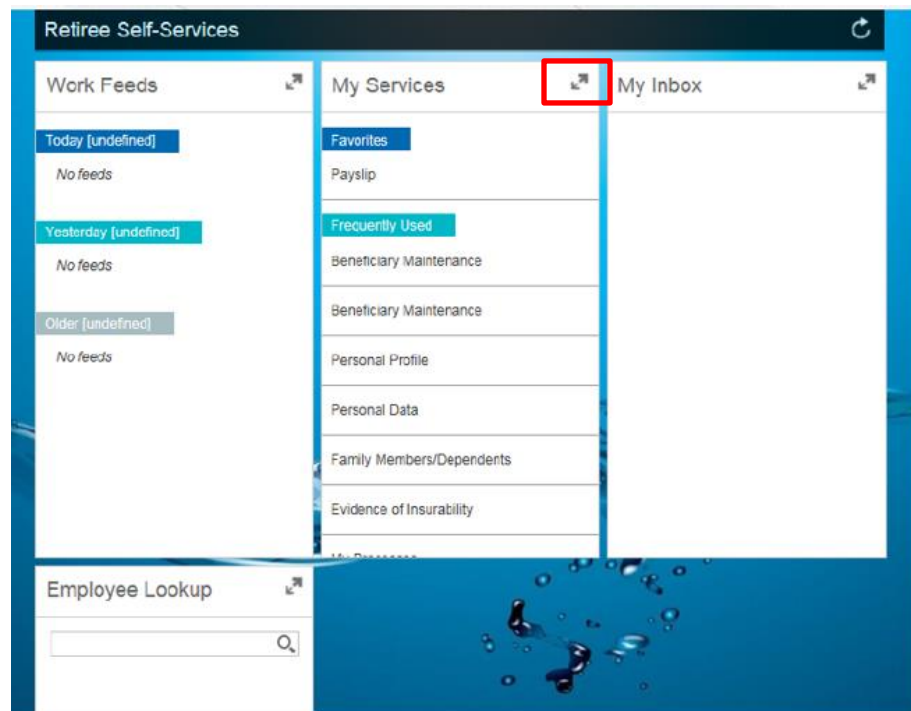
4.3 After you press Log in (Access here) you will be directed to **Sign In** Page. For detail instructions on how to Access your account for the Retiree Self-Services Portal please [click here](#). Once you have Signed In please select the SAP Portal Retirees.



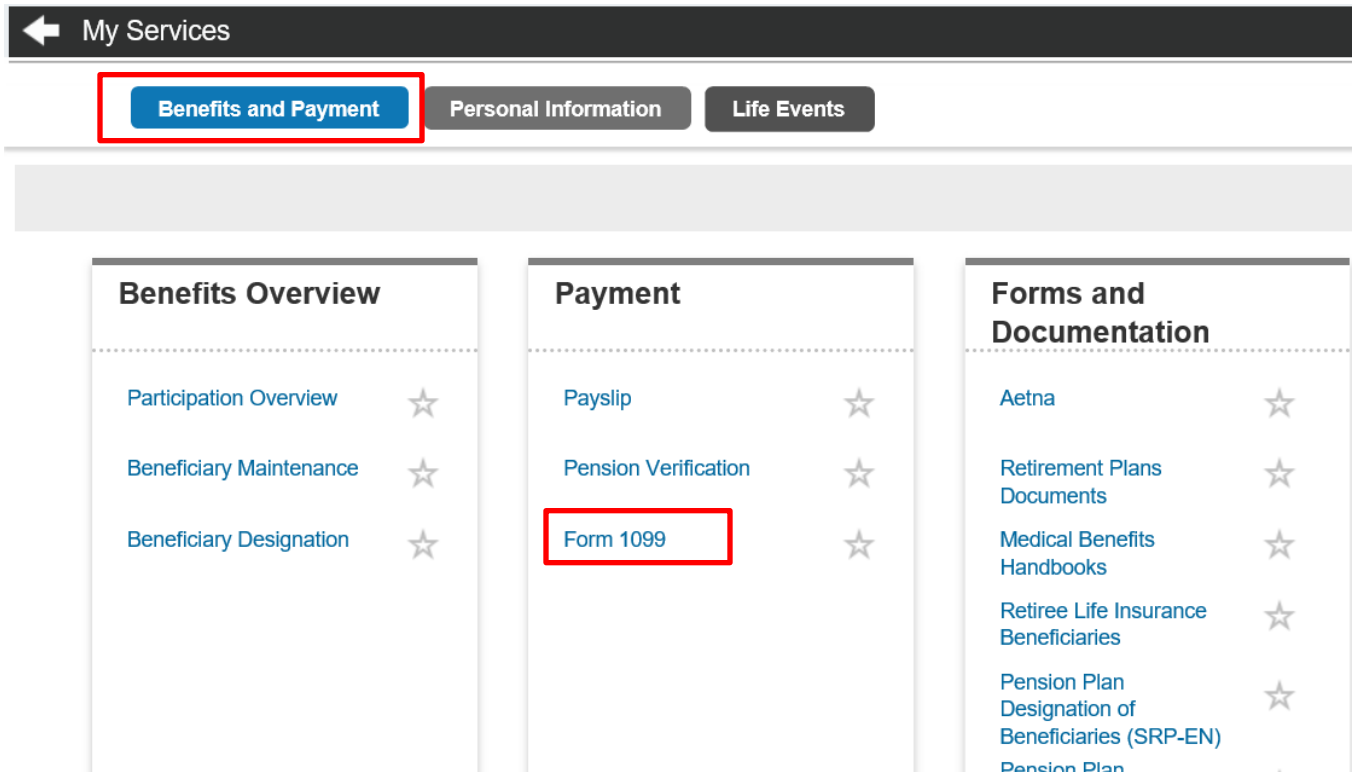
4.4 The SAP Portal will be displayed. Please press **Retiree Self-Service Launchpad**.



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



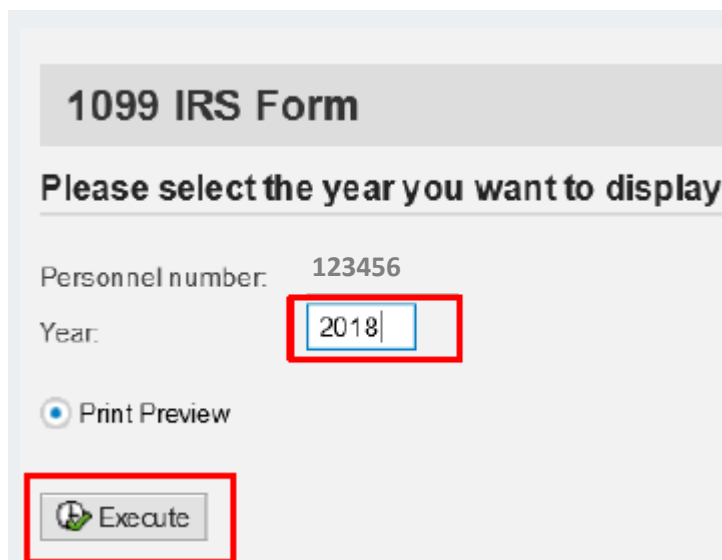
4.6 Click “Benefits and Payment” and “Form 1099”



← 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 Payer Tel# (202)623-2098		1 Gross distribution	OMB No. 1545-0119		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
		\$ 45,380.00	<div style="font-size: 2em; font-weight: bold;">2018</div> Form 1099-R		
		2a Taxable amount			
		\$ 39,900.00			
		2b Taxable amount not determined <input type="checkbox"/>	Total distribution <input type="checkbox"/>		COPY 1 For State, City, or Local Tax Department
PAYER'S Federal Identification number 52-6040854	RECIPIENT'S Identification number 123-45-6789	3 Capital gain (included in box 2a)	4 Federal income tax withheld		
		\$	\$		
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		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 <input type="checkbox"/>	
				\$	%
		9a Your percentage of total distribution		9b Total employee contributions	

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