

## 1. Purpose of Document

This job-aid will guide you to:

- Update your Tax Profile via the Retiree Self Service.

## 2. Systems and Applications

The system required for this procedure is:

- **Extranet Portal for Retirees of the IDB Group**

## 3. Intended Audience

The following roles will use this Job Aid:

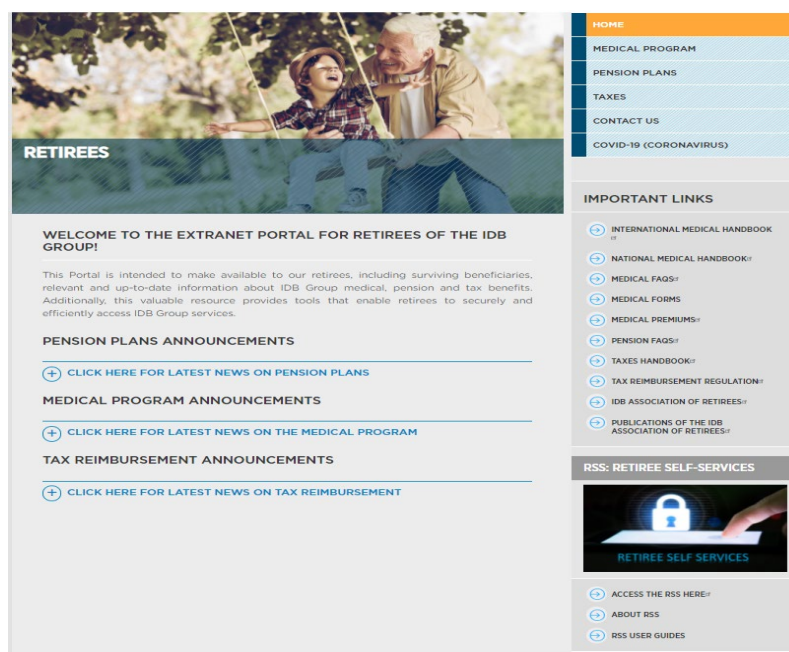
- U.S. Citizen Retirees

## 4. Procedure

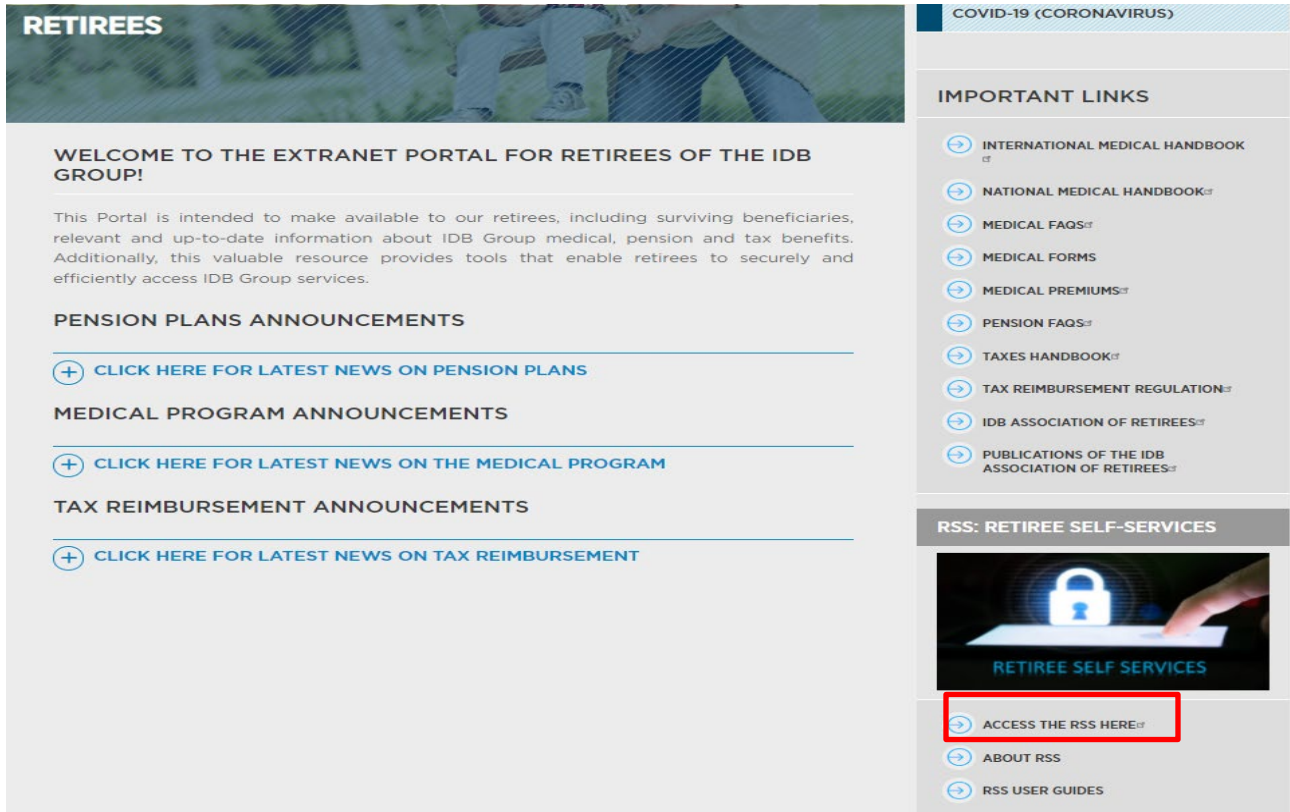
4.1 Visit the Extranet Portal for Retirees of the IDB Group:

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

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

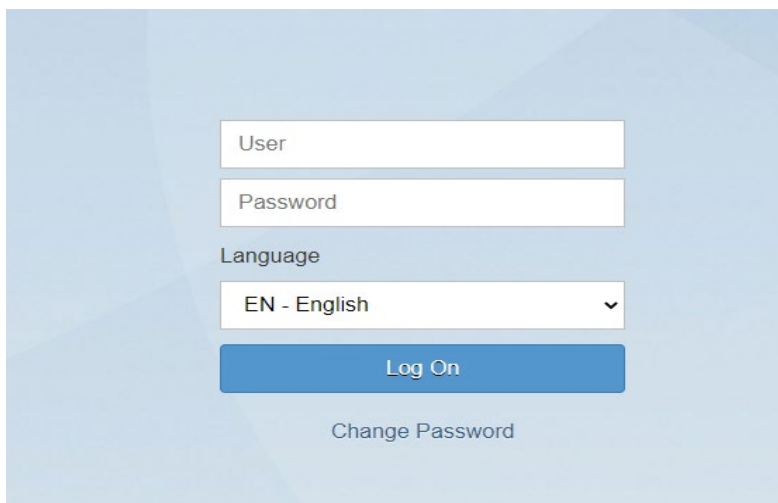


4.2 Click **“Log In (Access Here)”** located in the RSS menu on the lower right-hand side of the page. **You will need to have an active account to be able to Log into RSS.**



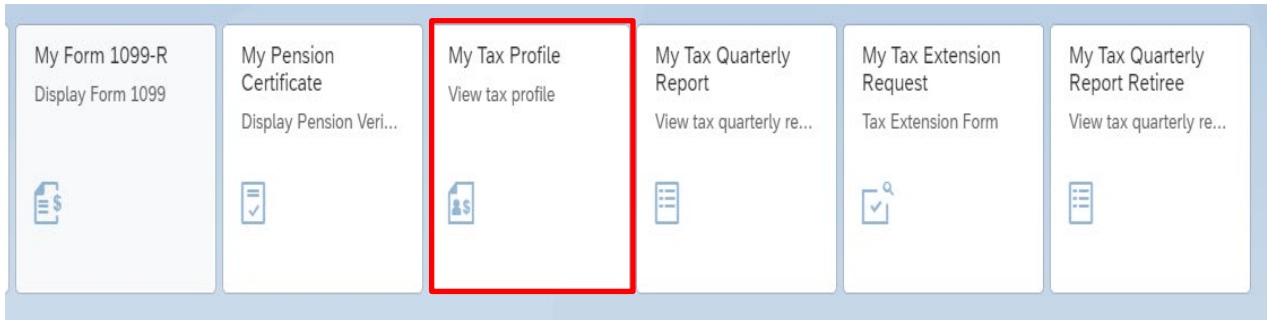
The screenshot shows the IDB Retirees Extranet Portal. The main header is "RETIREES" with a background image of people. Below the header, there is a welcome message: "WELCOME TO THE EXTRANET PORTAL FOR RETIREES OF THE IDB GROUP!". A paragraph follows: "This Portal is intended to make available to our retirees, including surviving beneficiaries, relevant and up-to-date information about IDB Group medical, pension and tax benefits. Additionally, this valuable resource provides tools that enable retirees to securely and efficiently access IDB Group services." Below this, there are three sections: "PENSION PLANS ANNOUNCEMENTS" with a link "+ CLICK HERE FOR LATEST NEWS ON PENSION PLANS", "MEDICAL PROGRAM ANNOUNCEMENTS" with a link "+ CLICK HERE FOR LATEST NEWS ON THE MEDICAL PROGRAM", and "TAX REIMBURSEMENT ANNOUNCEMENTS" with a link "+ CLICK HERE FOR LATEST NEWS ON TAX REIMBURSEMENT". On the right side, there is a "COVID-19 (CORONAVIRUS)" section. Below that is an "IMPORTANT LINKS" section with a list of links: "INTERNATIONAL MEDICAL HANDBOOK", "NATIONAL MEDICAL HANDBOOK", "MEDICAL FAQS", "MEDICAL FORMS", "MEDICAL PREMIUMS", "PENSION FAQS", "TAXES HANDBOOK", "TAX REIMBURSEMENT REGULATION", "IDB ASSOCIATION OF RETIREES", and "PUBLICATIONS OF THE IDB ASSOCIATION OF RETIREES". Below the links is an "RSS: RETIREE SELF-SERVICES" section with a graphic of a hand pointing at a screen with a padlock icon and the text "RETIREE SELF SERVICES". Below the graphic is a link "ACCESS THE RSS HERE" which is highlighted with a red box. Other links in this section are "ABOUT RSS" and "RSS USER GUIDES".







4.3. 4.3 After clicking on “Log in (Access here)”, you will be directed to **Sign In Page**.



The Sign In Page has a light blue background. It contains a "User" input field, a "Password" input field, and a "Language" dropdown menu set to "EN - English". Below these fields is a blue "Log On" button. At the bottom, there is a "Change Password" link.

4.4 Once you have Signed In, please click on **“My Tax Profile”**.



My Form 1099-R Display Form 1099 	My Pension Certificate Display Pension Veri... 	My Tax Profile View tax profile 	My Tax Quarterly Report View tax quarterly re... 	My Tax Extension Request Tax Extension Form 	My Tax Quarterly Report Retiree View tax quarterly re... 
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4.5 Update your federal and state filing status for the current year.



**Tax Profile**

Save 03/14/2022

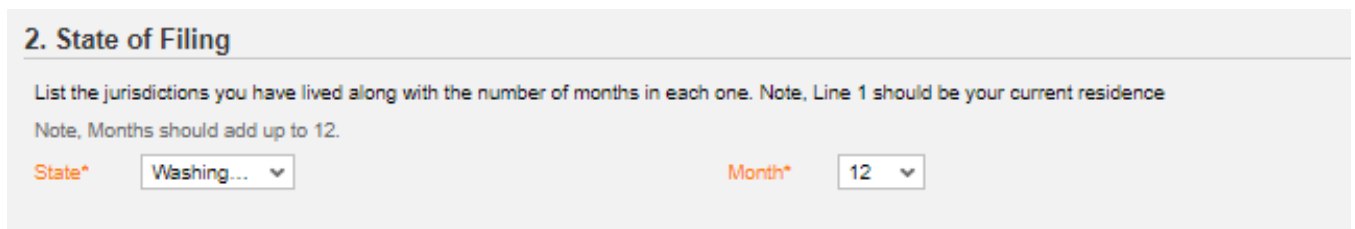
Emp Id [Redacted] Name [Redacted]  
 SSN [Redacted] Filing Type Standard Deduction  
 Country of Filing USA

**1. Tax Filing Status**

On Record For Current Year

MFJ Federal	Federal Married Filing Jointly
MFJ State	State Married Filing Jointly

4.6 List the states you have lived within in the current year and the number of months lived in each state. The total number of months should add up to 12.

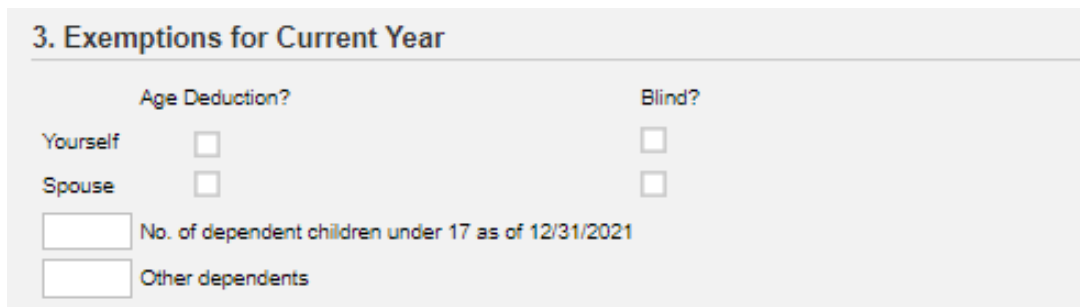


**2. State of Filing**

List the jurisdictions you have lived along with the number of months in each one. Note, Line 1 should be your current residence  
 Note, Months should add up to 12.

State*	Month*
Washing...	12

4.7 Complete your exemptions information for the current year.



**3. Exemptions for Current Year**

Age Deduction?	Blind?
Yourself <input type="checkbox"/> Spouse <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
<input type="text"/> No. of dependent children under 17 as of 12/31/2021 <input type="text"/> Other dependents	

## 4.8 Update your spouse income information for federal and state.

4A. Spouse Income (Federal)		4B. Spouse Income (State)	
(A) Wages, Salaries, tips, etc.	<input type="text" value="0.00"/>	(A) Wages, Salaries, tips, etc.	<input type="text" value="0.00"/>
(B) Other Income	<input type="text" value="0.00"/>	(B) Other Income	<input type="text" value="0.00"/>

## 4.9 Update your spouse information.

### 4C. Spouse Information

Is your spouse an employee or retiree of the IDB Group?

Spouse Birthdate

Spouse Death Date

## 4.10 Enter your pension data.

### 5. Pension Payment

Date of your first monthly pension payment

Current year pension commutation

## 4.11 Enter any estimated annual outside income.

### 6. Estimated Annual Retiree Outside Income

Annual Outside Income

I certify that i have(or will have)  earned outside income.

## 4.12 Click the Save button on the top left corner once you have completely updated all your information.



### Tax Profile

Emp Id	<input type="text" value=""/>	Name	<input type="text" value=""/>
SSN	<input type="text" value=""/>	Filing Type	Standard Deduction
Country of Filing	USA		

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**Result**

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You have viewed the steps to update your tax profile via the Retiree Self Service.