

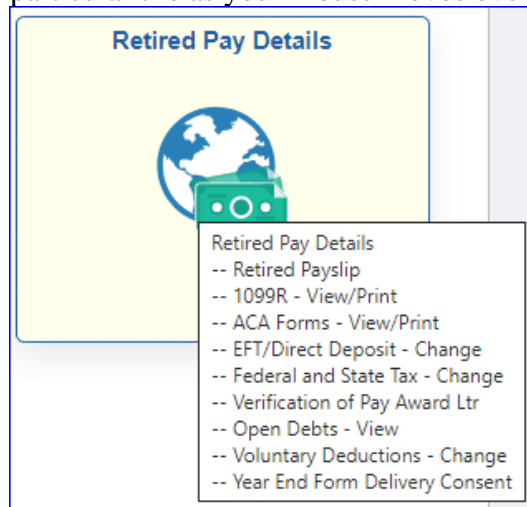
View/Print My Year End Forms Overview

Introduction This guide provides the procedures for Retirees, Annuitants, or Former Spouses to view, print, and/or save Year End tax forms in Direct Access (DA).

Before you Begin Payslips, 1099R, and ACA forms will open in a new window. It is important to turn off the pop-up blocker in your web browser to view them. If you are using a MAC, you may need to download another browser such as Chrome or Internet Explorer. For more information on how to turn off the pop-up blocker, see the [Direct Access Compatible Browsers](#) user guide.

You will also need Adobe Acrobat reader installed. An Adobe Acrobat link is provided upon opening the 1099R and ACA forms pages.

Changes to Direct Access Homepage You will notice a change in how Direct Access displays upon login. There is a new “hover” feature that shows what is covered under a particular tile as your mouse moves over the tile as shown below.



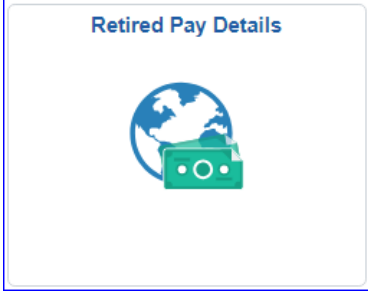
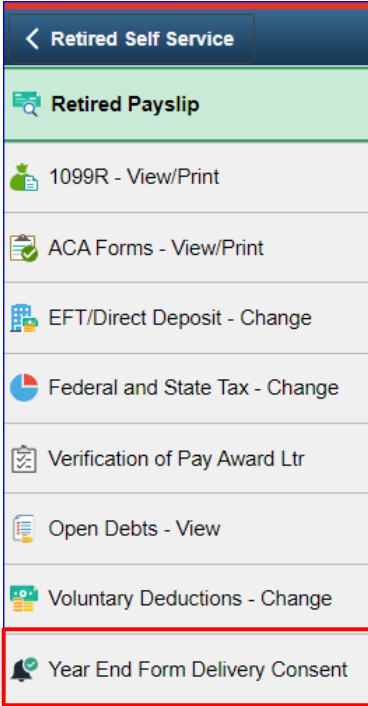
Contents

Topic	See Page
Tax Consent Form	2
View/Print 1099R	6
View/Print Affordable Care Act (ACA) Forms	11

Tax Consent Form

Introduction This section provides the procedures for consenting to receive electronic tax documents in DA.


Procedures See below.

Step	Action
1	<p>Log into DA Self Service at Direct Access Self Service. Select the Retired Pay Details tile from the Retiree Self Service homepage.</p>  <p>The image shows a tile titled "Retired Pay Details" with a blue border. Inside the tile is a blue globe icon with a green speech bubble containing a white question mark.</p>
2	<p>Select the Year End Form Delivery Consent option.</p>  <p>The image shows a screenshot of the "Retired Self Service" menu. The menu has a dark blue header with a back arrow and the text "Retired Self Service". Below the header are several menu items, each with an icon and text: "Retired Payslip" (green icon), "1099R - View/Print" (green icon), "ACA Forms - View/Print" (green icon), "EFT/Direct Deposit - Change" (blue icon), "Federal and State Tax - Change" (blue icon), "Verification of Pay Award Ltr" (checklist icon), "Open Debts - View" (document icon), "Voluntary Deductions - Change" (green icon), and "Year End Form Delivery Consent" (bell icon). The "Year End Form Delivery Consent" item is highlighted with a red border.</p>

Continued on next page

Tax Consent Form, Continued


Procedures, continued

Step	Action
3	<p data-bbox="320 454 925 488">The Tax Document Consent Form will display.</p> <div data-bbox="320 488 1396 1198" style="border: 1px solid black; padding: 10px;"> <p data-bbox="328 495 719 524">Tax Document Consent Form</p> <p data-bbox="328 539 475 566">AXEL FOLEY</p> <p data-bbox="320 577 1310 624">Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099R, and all corrected versions of these forms.</p> <div data-bbox="320 636 1337 1003" style="border: 1px solid black; padding: 5px;"> <p data-bbox="328 642 1302 710">If your current status (shown below this text box) is "Consent received", you don't need to make any changes. This means your tax forms will not be mailed, you will access them online. Thank you for helping to save money by reducing our printing and mailing costs.</p> <p data-bbox="328 728 1262 754">If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by mail.</p> <p data-bbox="328 772 1321 887">By withdrawing your consent you indicate that wish to receive future tax forms via U.S. Postal Service mail. If this is your wish it is extremely important that you keep your mailing address up-to-date in the system. Opting out of receiving the forms by mail will help protect you against fraud and identity theft. These forms all contain information highly sought by thieves. Keeping this data out of your mailbox will reduce the chance the information will fall into the wrong hands.</p> <p data-bbox="328 904 1329 954">Just click the box (below) where it says "Check here to indicate your consent to receive electronic tax forms" and click the Submit button to update your status.</p> </div> <p data-bbox="320 1010 729 1055">  Your Current Status: Consent received. </p> <p data-bbox="320 1084 1075 1113"> <input type="checkbox"/> Check here to withdraw your consent to receive electronic W-2 and W-2c forms. </p> <p data-bbox="320 1144 445 1173"> <input type="button" value="Submit"/> </p> <div data-bbox="1134 1113 1385 1173" style="text-align: right;"> View/Print 1099R View/Print ACA Forms </div> </div>

Continued on next page

Tax Consent Form, Continued

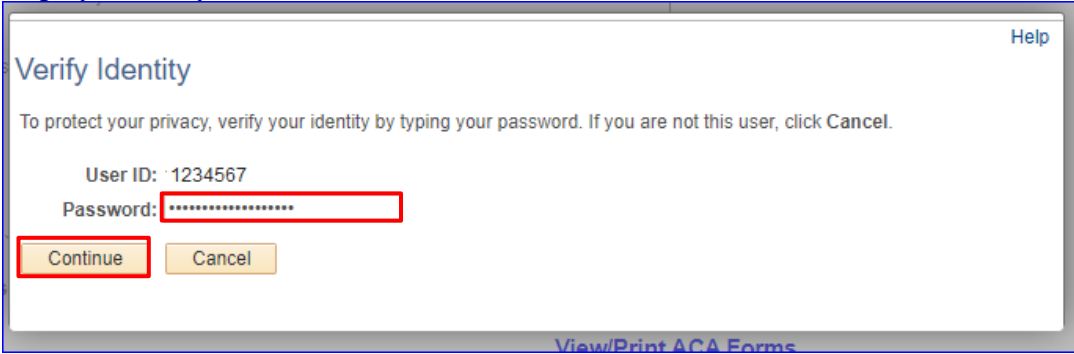
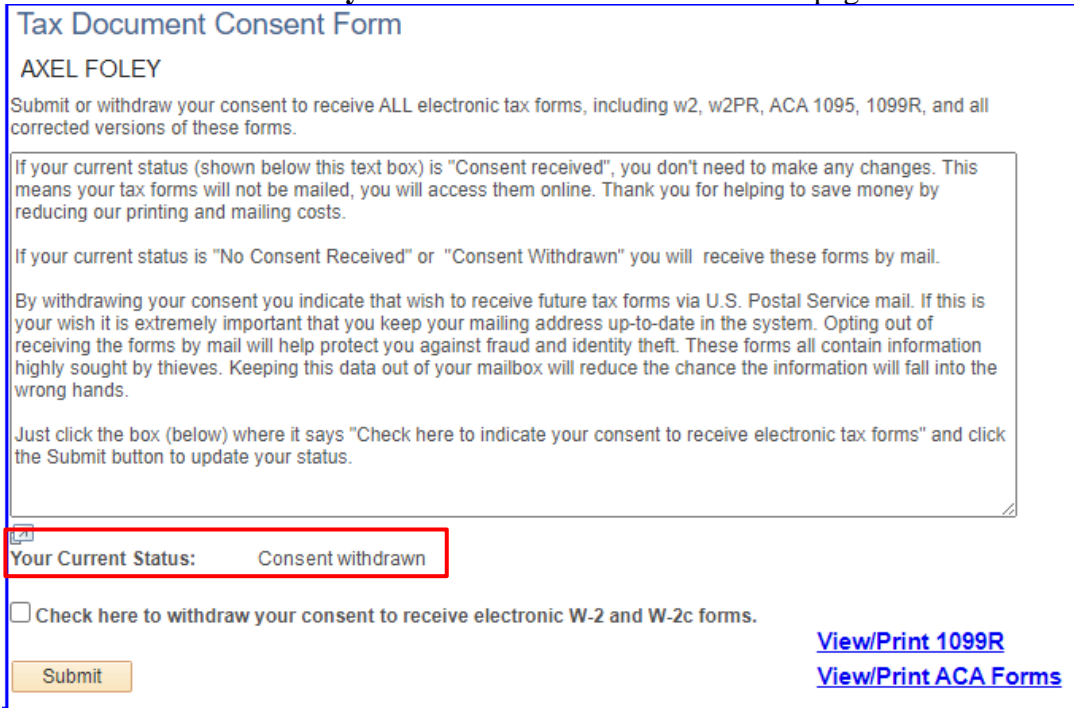
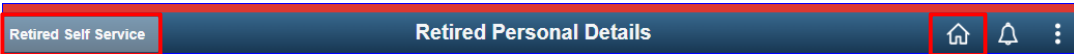
Procedures, continued

Step	Action
4	<p>If Your Current Status indicates No Consent Received or Consent Withdrawn and you wish to receive these forms electronically, click “Check here to indicate your consent to receive electronic W-2 and W-2c forms”. Click Submit.</p> <p>Or</p> <p>If Your Current Status indicates Consent Received and you wish to receive paper copies of these forms, click “Check here to withdraw your consent to receive electronic W-2 and W-2c forms”. Click Submit.</p> <div style="border: 1px solid blue; padding: 10px;"> <p>Tax Document Consent Form</p> <p>AXEL FOLEY</p> <p>Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099R, and all corrected versions of these forms.</p> <p>If your current status (shown below this text box) is "Consent received", you don't need to make any changes. This means your tax forms will not be mailed, you will access them online. Thank you for helping to save money by reducing our printing and mailing costs.</p> <p style="border: 2px solid red; padding: 2px;">If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by mail.</p> <p>By withdrawing your consent you indicate that wish to receive future tax forms via U.S. Postal Service mail. If this is your wish it is extremely important that you keep your mailing address up-to-date in the system. Opting out of receiving the forms by mail will help protect you against fraud and identity theft. These forms all contain information highly sought by thieves. Keeping this data out of your mailbox will reduce the chance the information will fall into the wrong hands.</p> <p>Just click the box (below) where it says "Check here to indicate your consent to receive electronic tax forms" and click the Submit button to update your status.</p> <p> Your Current Status: Consent received.</p> <p style="border: 2px solid red; padding: 2px;"><input checked="" type="checkbox"/> Check here to withdraw your consent to receive electronic W-2 and W-2c forms.</p> <p style="border: 2px solid red; padding: 2px; display: inline-block;">Submit</p> <p style="text-align: right;">View/Print 1099R View/Print ACA Forms</p> </div>

Continued on next page

Tax Consent Form, Continued

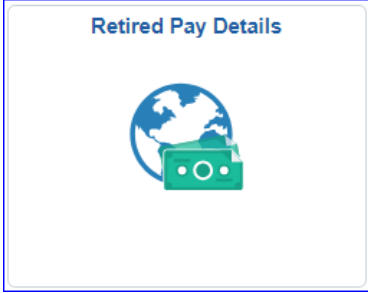
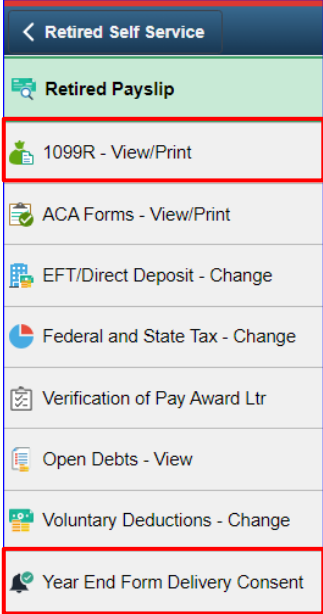
Procedures, continued

Step	Action
5	<p>If you elected to change your consent status, the Verify Identity message will display. Enter your Direct Access Password and click Continue.</p> 
6	<p>Your Current Status will update based on the selection made in Step 4. Click Return to CG Retired Pay Self Service to return to the home page.</p> 
7	<p>To return to the main homepage, click the Retired Self Service back arrow or the House icon.</p> 

View/Print 1099R

Introduction This section provides the procedures to view, print, and/or save a 1099R in DA.


Procedures See below.

Step	Action
1	<p>Select the Retired Pay Details tile from the Retiree Self Service homepage.</p>  <p>The image shows a square tile with a blue border. At the top, it says 'Retired Pay Details' in blue text. Below the text is a graphic of a globe with a green wallet icon in front of it.</p>
2	<p>There are two ways to access the 1099R forms. 1) Select Year End Form Delivery Consent or 2) Select 1099R – View/Print and skip to Step 4.</p>  <p>The image shows a vertical menu titled 'Retired Self Service'. The menu items are: 'Retired Payslip', '1099R - View/Print', 'ACA Forms - View/Print', 'EFT/Direct Deposit - Change', 'Federal and State Tax - Change', 'Verification of Pay Award Ltr', 'Open Debts - View', 'Voluntary Deductions - Change', and 'Year End Form Delivery Consent'. The '1099R - View/Print' and 'Year End Form Delivery Consent' items are highlighted with red boxes.</p>

Continued on next page

View/Print 1099R, Continued

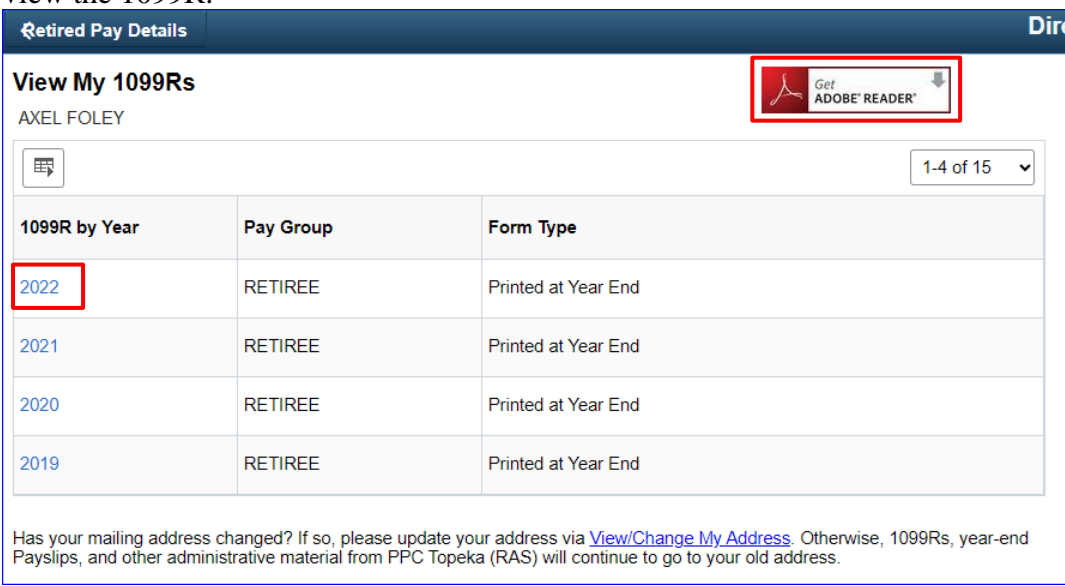
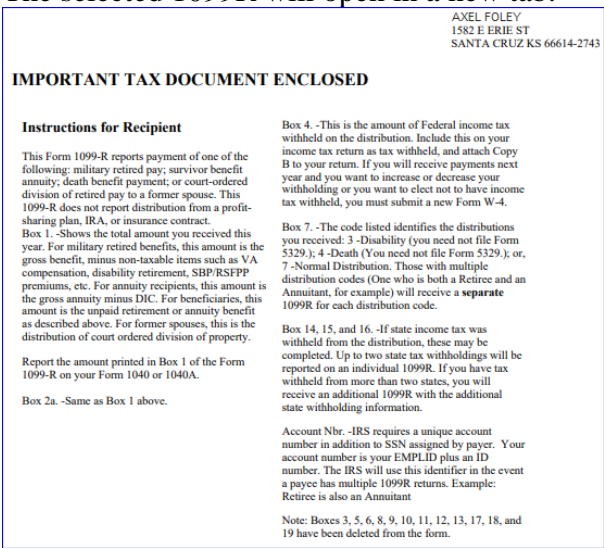
Procedures, continued

Step	Action
3	<p>The Tax Document Consent Form will display. To access the 1099R forms, click View/Print 1099R.</p> <div data-bbox="316 528 1385 1227" style="border: 1px solid blue; padding: 10px;"> <p>Tax Document Consent Form</p> <p>AXEL FOLEY</p> <p>Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099R, and all corrected versions of these forms.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p>If your current status (shown below this text box) is "Consent received", you don't need to make any changes. This means your tax forms will not be mailed, you will access them online. Thank you for helping to save money by reducing our printing and mailing costs.</p> <p>If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by mail.</p> <p>By withdrawing your consent you indicate that wish to receive future tax forms via U.S. Postal Service mail. If this is your wish it is extremely important that you keep your mailing address up-to-date in the system. Opting out of receiving the forms by mail will help protect you against fraud and identity theft. These forms all contain information highly sought by thieves. Keeping this data out of your mailbox will reduce the chance the information will fall into the wrong hands.</p> <p>Just click the box (below) where it says "Check here to indicate your consent to receive electronic tax forms" and click the Submit button to update your status.</p> </div> <p> Your Current Status: Consent received.</p> <p><input type="checkbox"/> Check here to withdraw your consent to receive electronic W-2 and W-2c forms.</p> <p style="text-align: center;"><input type="button" value="Submit"/></p> <div style="text-align: right; margin-top: 10px;"> <div style="border: 2px solid red; padding: 2px; display: inline-block;">View/Print 1099R</div> View/Print ACA Forms </div> </div>

Continued on next page

View/Print 1099R, Continued


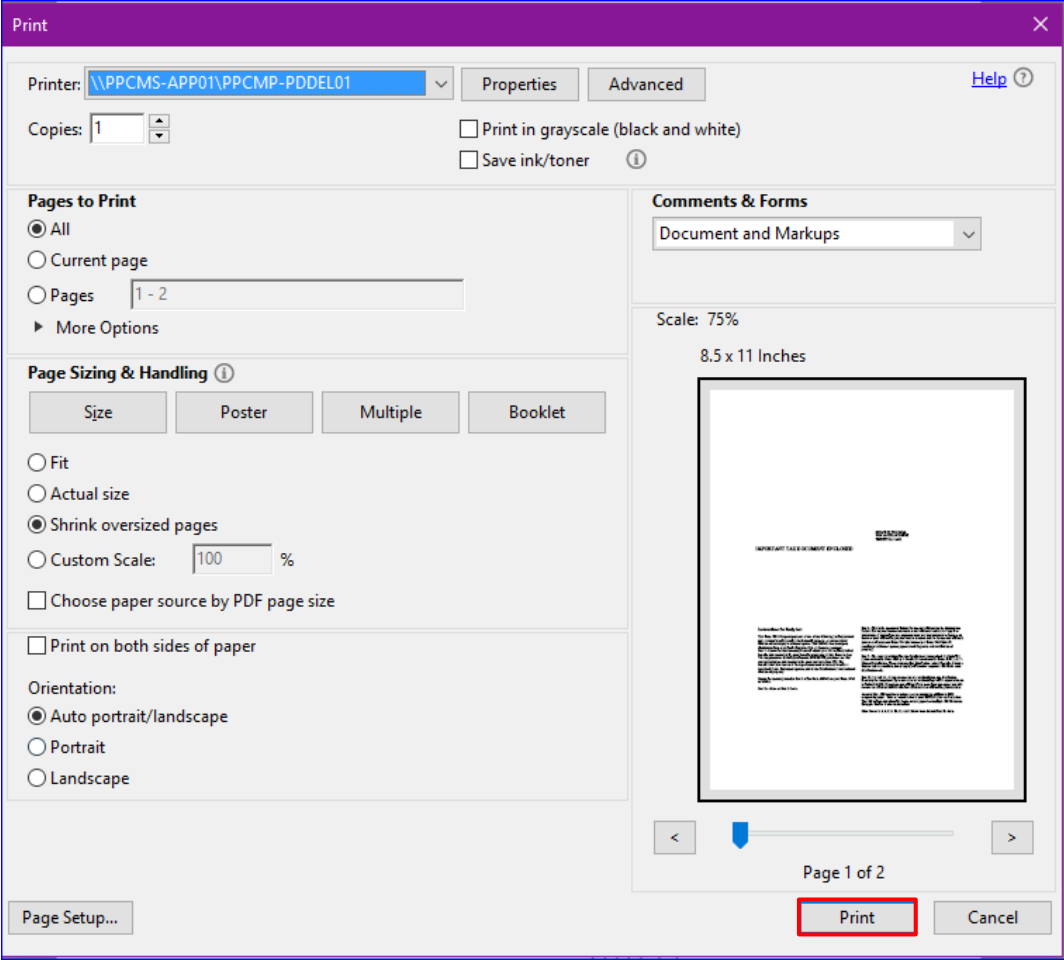
Procedures,
continued

Step	Action
3	<p>A list of the available 1099Rs will display. Click on the appropriate 1099R by year link.</p> <p>NOTE: You will need Adobe Reader to view the 1099R. If you do not currently have Adobe Reader, you will need to download it by clicking on the Get Adobe Reader link and follow the instructions provided by Adobe.</p> <p>Remember: You will need to turn off pop-up blockers in your web browser to view the 1099R.</p>  <p>The screenshot shows a web interface titled "Retired Pay Details" with a sub-header "View My 1099Rs" for user "AXEL FOLEY". There is a "Get ADOBE READER" button in the top right. Below it is a table with columns "1099R by Year", "Pay Group", and "Form Type". The table lists years 2022, 2021, 2020, and 2019, all with "RETIREE" pay group and "Printed at Year End" form type. The year 2022 is highlighted with a red box. At the bottom of the screenshot, there is a message: "Has your mailing address changed? If so, please update your address via View/Change My Address. Otherwise, 1099Rs, year-end Payslips, and other administrative material from PPC Topeka (RAS) will continue to go to your old address."</p>
4	<p>The selected 1099R will open in a new tab.</p>  <p>The screenshot shows a 1099R form for AXEL FOLEY, 1582 E ERIE ST, SANTA CRUZ KS 66614-2743. The form is titled "IMPORTANT TAX DOCUMENT ENCLOSED". It contains instructions for the recipient and details for various boxes. Box 1 shows the total amount received. Box 2 shows the gross benefit, minus non-taxable items. Box 3 shows the gross annuity minus DIC. Box 4 shows the amount of Federal income tax withheld. Box 7 shows the distribution codes. Box 14, 15, and 16 show state income tax withheld. Box 19 shows the account number.</p>

Continued on next page

View/Print 1099R, Continued


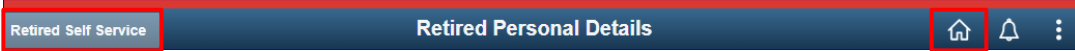
Procedures, continued

Step	Action
5	<p>The 1099R may be printed and/or saved to your personal files.</p> <p>To print: Click the printer icon located on the document's tool bar.</p> 
6	<p>The printer dialog will open. Ensure the printer name is correct and click Print.</p> 

Continued on next page

View/Print 1099R, Continued

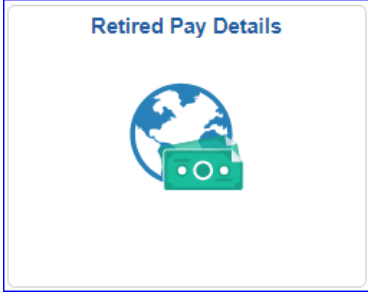
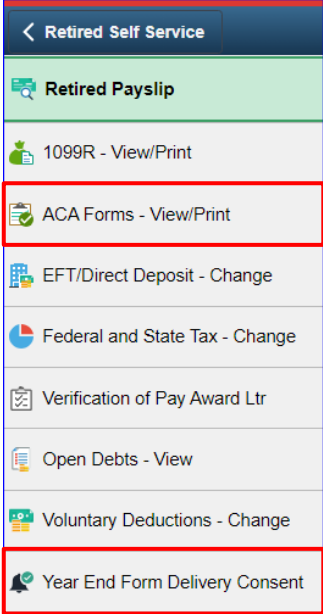
Procedures, continued

Step	Action
7	<p>To save the document to your computer, click the disk icon located on the document's tool bar.</p>  A screenshot of a document toolbar. It contains several icons: a disk icon (highlighted with a red box), a printer icon, two circular arrows (one up, one down), a page indicator '1 / 2', two circular arrows (one left, one right), and a document icon.
8	<p>To exit out of the 1099R, you will need to close the tab. To view another 1099R, select another year from the list of available 1099Rs. Close the 1099R browser window when finished.</p> <p>To return to the main homepage, click the Retired Self Service back arrow or the House icon.</p>  A screenshot of a browser header bar. It has a dark blue background. On the left, there is a button labeled 'Retired Self Service' (highlighted with a red box). In the center, it says 'Retired Personal Details'. On the right, there is a home icon (highlighted with a red box), a bell icon, and a three-dot menu icon.

View/Print Affordable Care Act (ACA) Forms

Introduction This section provides the procedures to view, print, and/or save Affordable Care Act (ACA) forms in DA.

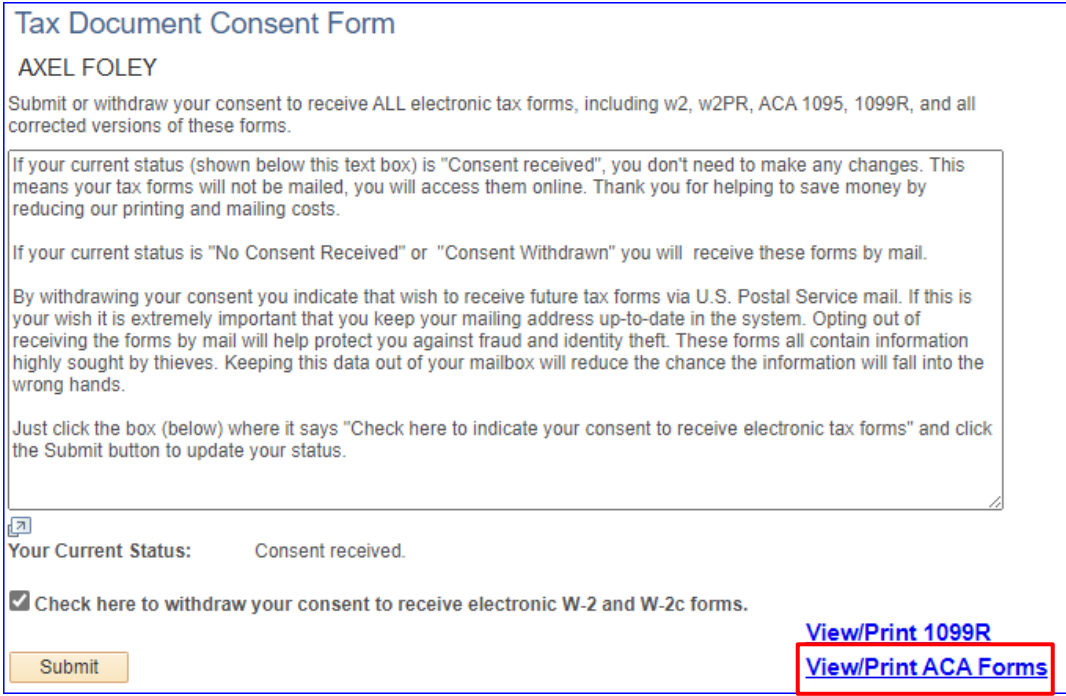
Procedures See below.

Step	Action
1	<p>Select the Retired Pay Details tile from the Retiree Self Service homepage.</p>  <p>The image shows a square tile with a blue border. At the top, it says 'Retired Pay Details' in blue text. Below the text is a graphic of a globe with a green wallet icon in front of it.</p>
2	<p>There are two ways to access the 1099R forms. 1) Select Year End Form Delivery Consent or 2) Select ACA Forms – View/Print and skip to Step 4.</p>  <p>The image shows a vertical menu titled 'Retired Self Service'. The menu items are: Retired Payslip, 1099R - View/Print, ACA Forms - View/Print (highlighted with a red box), EFT/Direct Deposit - Change, Federal and State Tax - Change, Verification of Pay Award Ltr, Open Debts - View, Voluntary Deductions - Change, and Year End Form Delivery Consent (highlighted with a red box).</p>

Continued on next page

View/Print Affordable Care Act (ACA) Forms, Continued

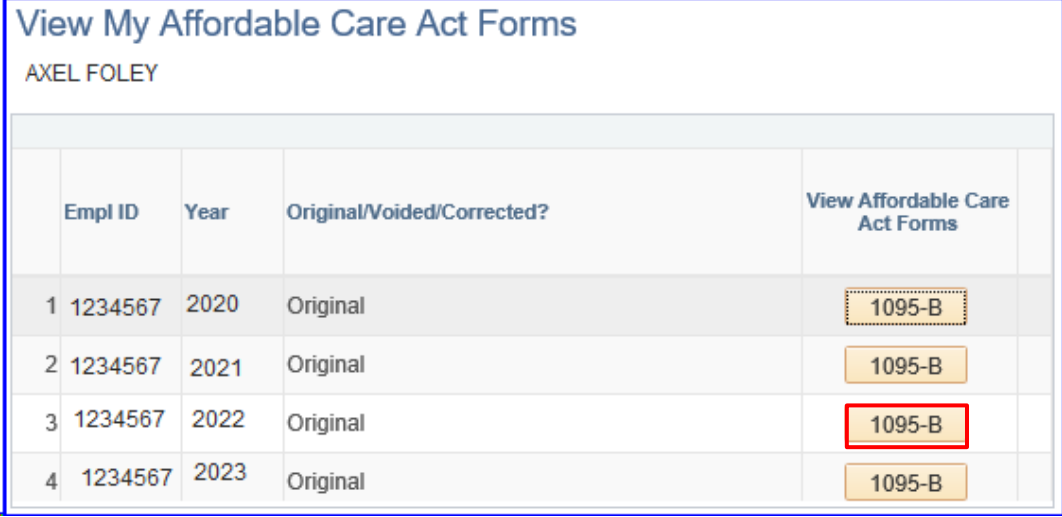
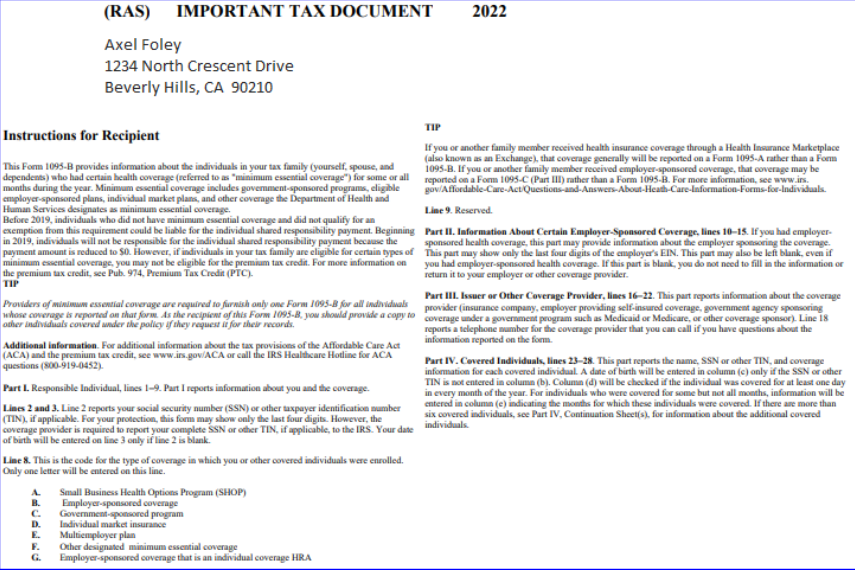
Procedures, continued

Step	Action
3	<p>The Tax Document Consent Form will display. To access the ACA forms, click View/Print ACA Forms.</p> <div> <p>Tax Document Consent Form</p> <p>AXEL FOLEY</p> <p>Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099R, and all corrected versions of these forms.</p> <p>If your current status (shown below this text box) is "Consent received", you don't need to make any changes. This means your tax forms will not be mailed, you will access them online. Thank you for helping to save money by reducing our printing and mailing costs.</p> <p>If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by mail.</p> <p>By withdrawing your consent you indicate that wish to receive future tax forms via U.S. Postal Service mail. If this is your wish it is extremely important that you keep your mailing address up-to-date in the system. Opting out of receiving the forms by mail will help protect you against fraud and identity theft. These forms all contain information highly sought by thieves. Keeping this data out of your mailbox will reduce the chance the information will fall into the wrong hands.</p> <p>Just click the box (below) where it says "Check here to indicate your consent to receive electronic tax forms" and click the Submit button to update your status.</p> <p> </p> <p>Your Current Status: Consent received.</p> <p><input checked="" type="checkbox"/> Check here to withdraw your consent to receive electronic W-2 and W-2c forms.</p> <p><input type="button" value="Submit"/></p> <p>View/Print 1099R View/Print ACA Forms</p> </div>

Continued on next page

View/Print Affordable Care Act (ACA) Forms, Continued


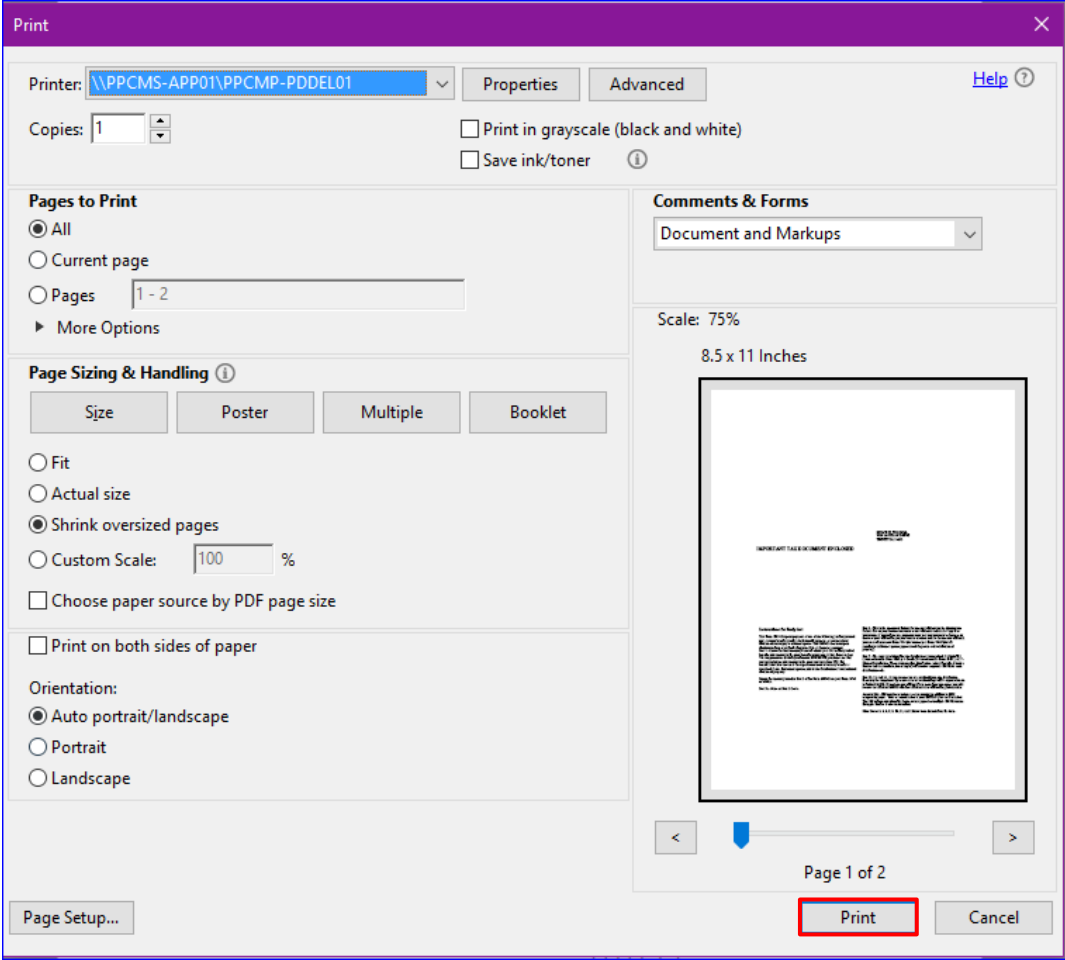
Procedures, continued

Step	Action
4	<p>A list of available ACA forms will display from oldest to newest. Locate the year of the form you want to open, click 1095-B for that year.</p> <p>NOTE: You will need Adobe Reader to view the 1095-B. If you do not currently have Adobe Reader, you will need to download it by clicking on the Get Adobe Reader link and follow the instructions provided by Adobe.</p> <p>Remember: You will need to turn off pop-up blockers in your web browser to view the 1095-B.</p> 
5	<p>The 1095-B will open in a new tab.</p> 

Continued on next page

View/Print Affordable Care Act (ACA) Forms, Continued


Procedures, continued

Step	Action
6	<p>The 1095-B may be printed and/or saved to your personal files.</p> <p>To print: Click the printer icon located on the document's tool bar.</p> 
7	<p>The printer dialog will open. Ensure the printer name is correct and click Print.</p> 

Continued on next page

View/Print Affordable Care Act (ACA) Forms, Continued

Procedures, continued

Step	Action
8	<p>To save the document to your computer, click the disk icon located on the document's tool bar.</p> 
9	<p>To exit out of the 1095-B, you will need to close the tab. To view another 1095-B, select another year from the list of available 1095-Bs.</p> <p>To return to the main homepage, click the Retired Self Service back arrow or the House icon.</p> 