

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).

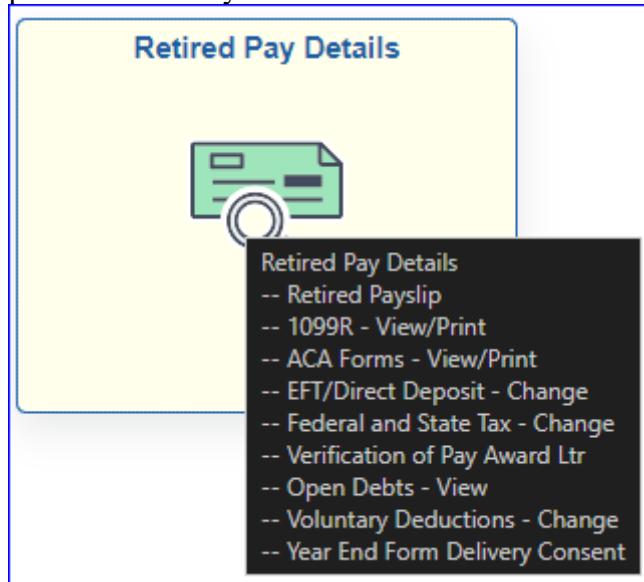
Before you Begin

Payslips, 1099R, and Affordable Care Act 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.



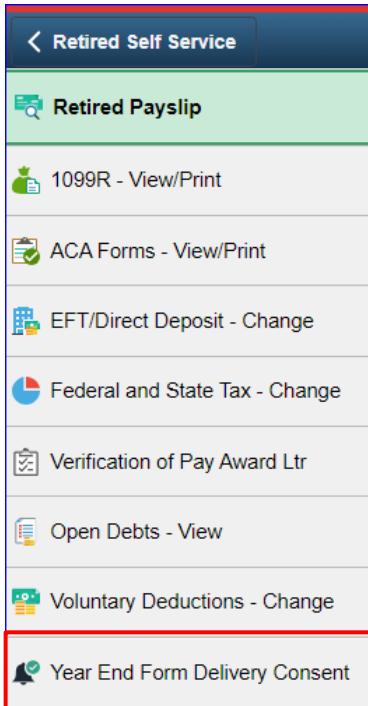
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Tax Consent Form

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> 
2	<p>Select the Year End Form Delivery Consent option.</p> 

Continued on next page

Tax Consent Form, Continued

Procedures, continued

Step	Action
3	<p>The Tax Document Consent Form will display.</p> <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><input checked="" type="checkbox"/> 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>Submit</p> <p style="text-align: right;">View/Print 1099R View/Print ACA Forms</p>

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Tax Consent Form, Continued

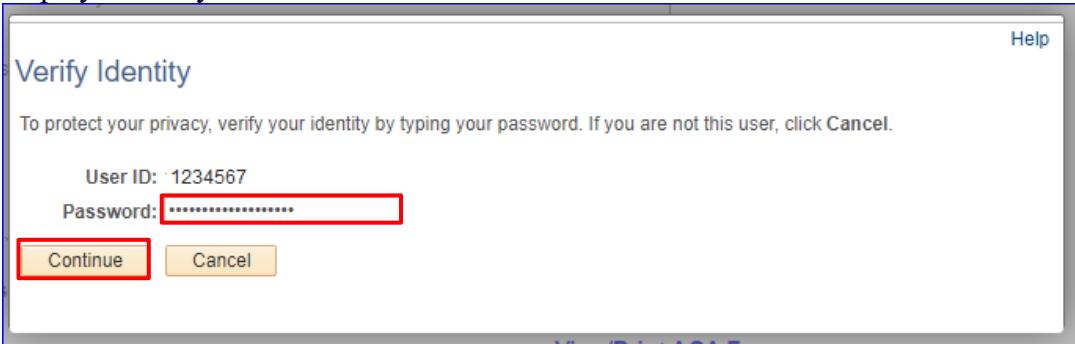
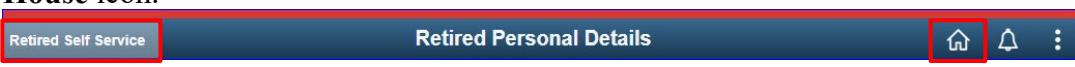
Procedures, continued

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>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><input checked="" type="checkbox"/> 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>Submit</p> <p style="text-align: right;">View/Print 1099R View/Print ACA Forms</p> </div>

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Tax Consent Form, Continued

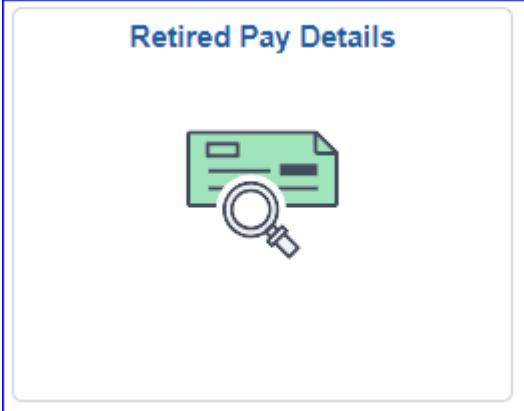
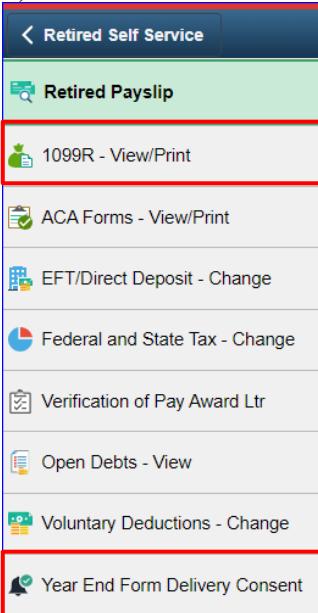
Procedures, continued

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> <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><input checked="" type="checkbox"/> Your Current Status: Consent withdrawn</p> <p><input type="checkbox"/> Check here to withdraw your consent to receive electronic W-2 and W-2c forms.</p> <p>Submit</p> <p>View/Print 1099R</p> <p>View/Print ACA Forms</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.
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Procedures	See below.
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Step	Action
1	Select the Retired Pay Details tile from the Retiree Self Service homepage. 
2	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. 

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View/Print 1099R, Continued

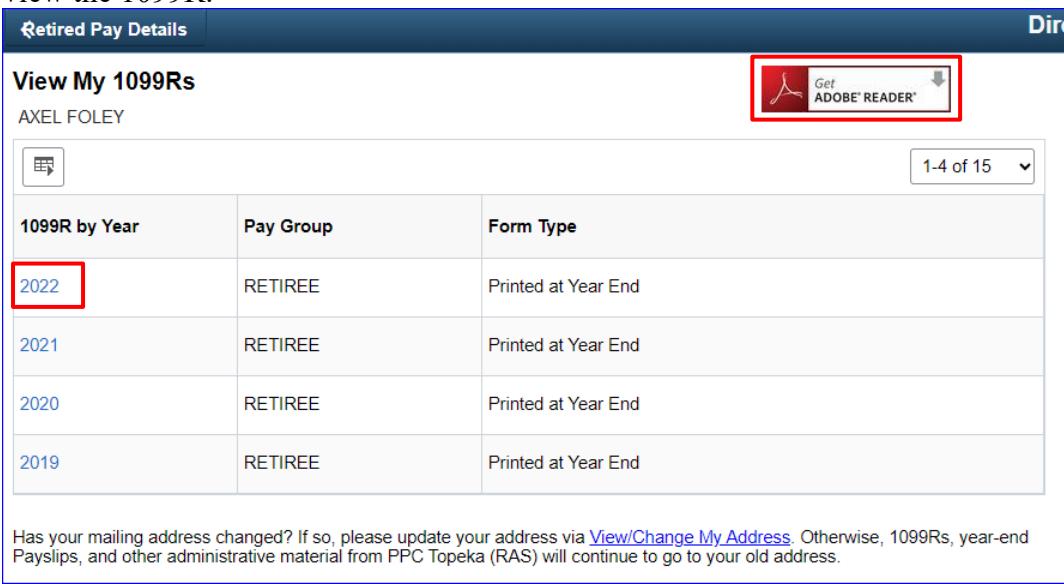
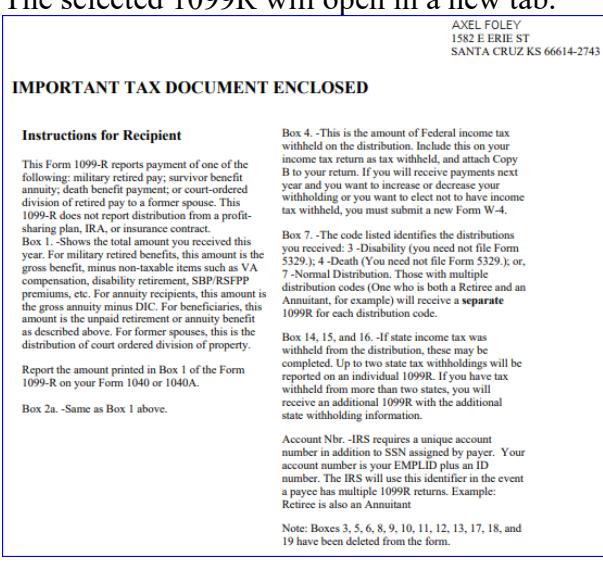
Procedures, continued

Step	Action
3	<p>The Tax Document Consent Form will display. To access the 1099R forms, click View/Print 1099R.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <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> </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><input type="button" value="Submit"/> View/Print 1099R View/Print ACA Forms</p>

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View/Print 1099R, Continued

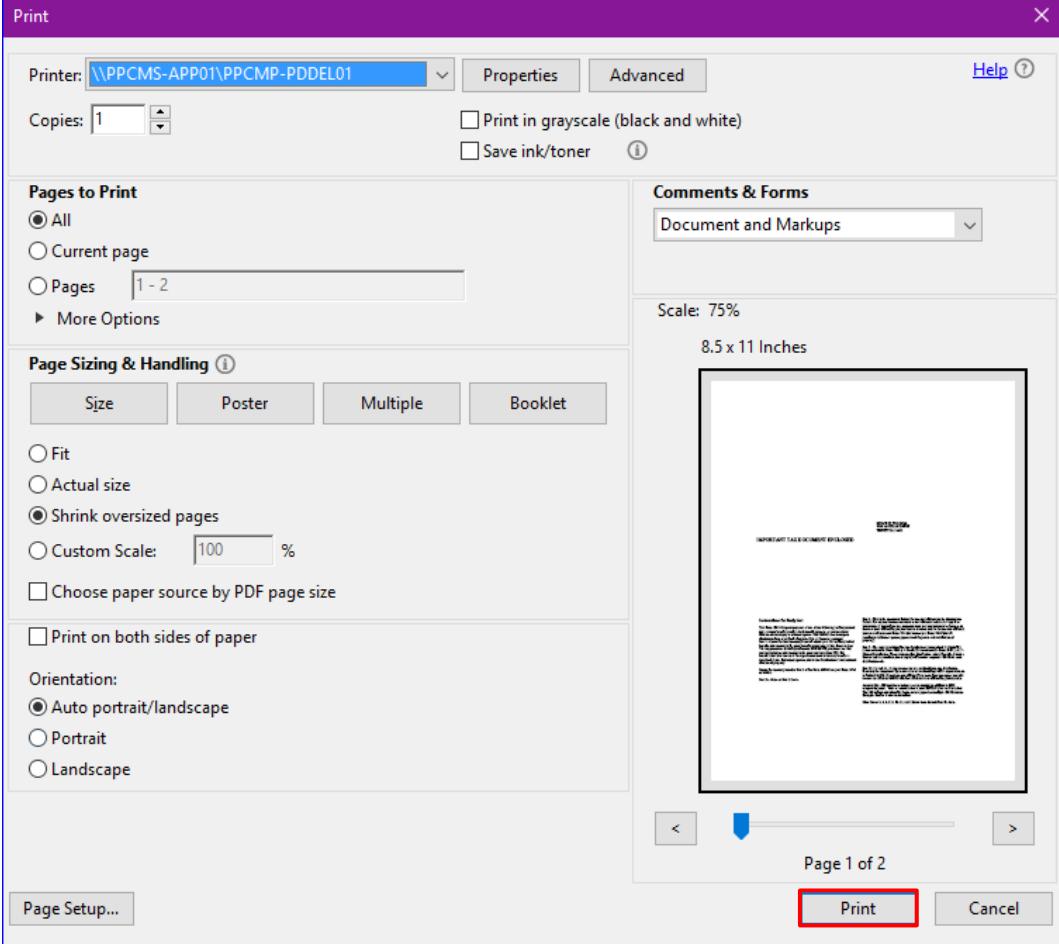
Procedures, continued

Step	Action
3	<p>A list of the available 1099Rs will display in descending order. 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 <u>turn off pop-up blockers</u> in your web browser to view the 1099R.</p>  <p>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> 

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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> 

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View/Print 1099R, Continued

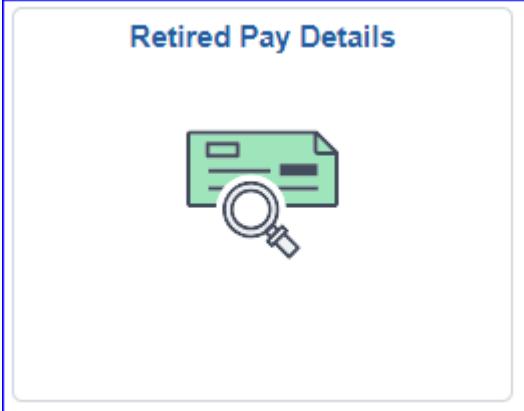
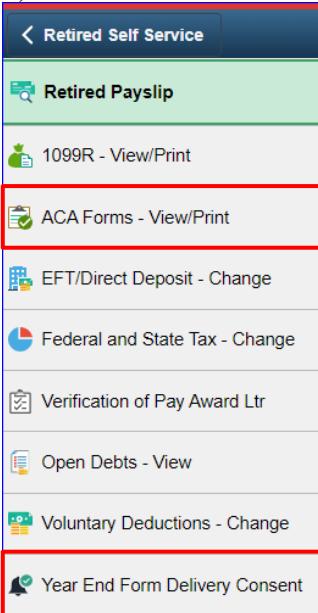
Procedures, continued

Step	Action
7	<p>To save the document to your computer, click the disk icon located on the document's tool bar.</p> 
8	<p>To exit out of the 1099R, you will need to close the tab.</p> <p>To view another 1099R, select another year from the list of available 1099Rs.</p> <p>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> 

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	Select the Retired Pay Details tile from the Retiree Self Service homepage. 
2	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. 

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 style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>Tax Document Consent Form</p> <p>Malcolm Reynolds</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 you 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><input checked="" type="checkbox"/> 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>View/Print 1099R</p> <p>View/Print ACA Forms</p>

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

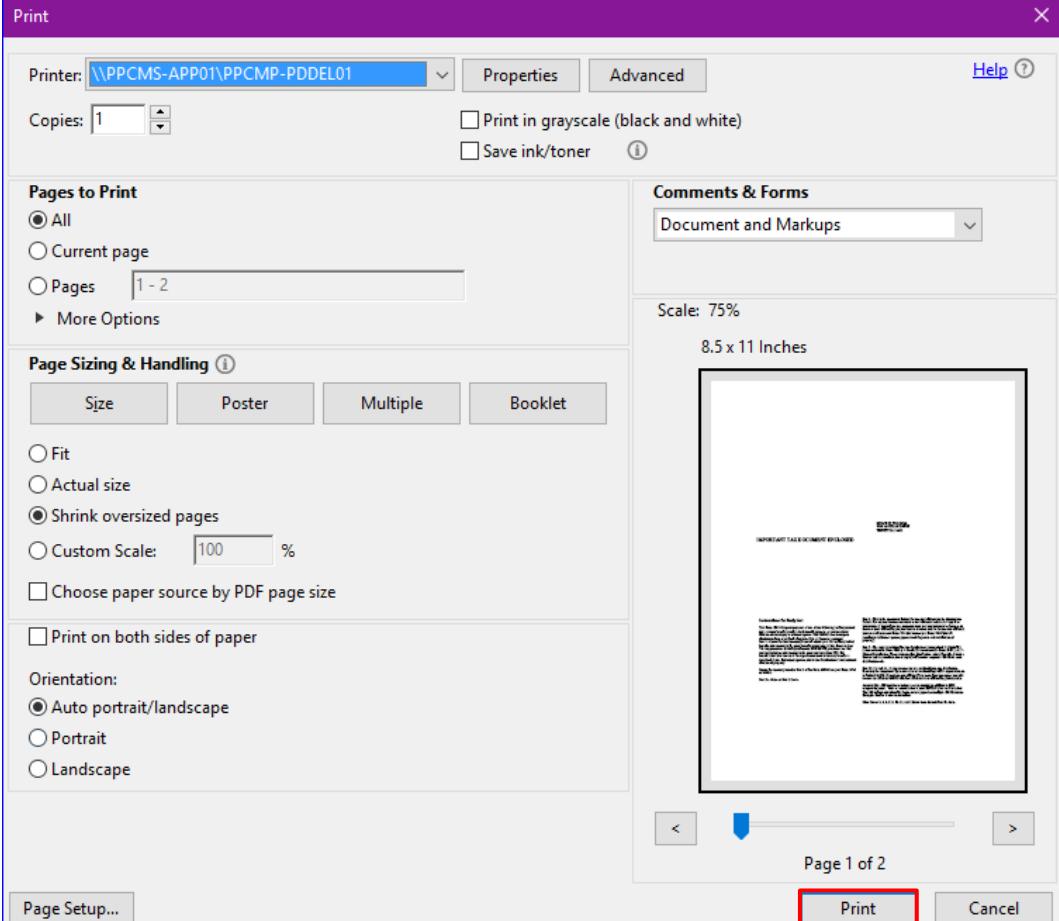
Procedures, continued

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 and click the 1095-B button 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: Turn off pop-up blockers in your web browser to view the 1095-B.</p> <div style="border: 1px solid #ccc; padding: 10px; width: fit-content; margin-left: auto; margin-right: auto;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Empl ID</th> <th>Year</th> <th>Original/Voided/Corrected?</th> <th>View Affordable Care Act Forms</th> </tr> </thead> <tbody> <tr><td>1</td><td>1234567</td><td>2015</td><td>Original</td><td>1095-C</td></tr> <tr><td>2</td><td>1234567</td><td>2016</td><td>Original</td><td>1095-C</td></tr> <tr><td>3</td><td>1234567</td><td>2017</td><td>Original</td><td>1095-C</td></tr> <tr><td>4</td><td>1234567</td><td>2018</td><td>Original</td><td>1095-C</td></tr> <tr><td>5</td><td>1234567</td><td>2019</td><td>Original</td><td>1095-C</td></tr> <tr><td>6</td><td>1234567</td><td>2020</td><td>Original</td><td>1095-C</td></tr> <tr><td>7</td><td>1234567</td><td>2021</td><td>Original</td><td>1095-C</td></tr> <tr><td>8</td><td>1234567</td><td>2021</td><td>Original</td><td>1095-B</td></tr> <tr><td>9</td><td>1234567</td><td>2022</td><td>Original</td><td>1095-B</td></tr> <tr><td>10</td><td>1234567</td><td>2023</td><td>Original</td><td>1095-B</td></tr> </tbody> </table> </div>		Empl ID	Year	Original/Voided/Corrected?	View Affordable Care Act Forms	1	1234567	2015	Original	1095-C	2	1234567	2016	Original	1095-C	3	1234567	2017	Original	1095-C	4	1234567	2018	Original	1095-C	5	1234567	2019	Original	1095-C	6	1234567	2020	Original	1095-C	7	1234567	2021	Original	1095-C	8	1234567	2021	Original	1095-B	9	1234567	2022	Original	1095-B	10	1234567	2023	Original	1095-B
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5	<p>The 1095-B will open in a new tab.</p> <div style="border: 1px solid #ccc; padding: 10px; width: fit-content; margin-left: auto; margin-right: auto;"> <p style="text-align: center;">(RAS) IMPORTANT TAX DOCUMENT 2022</p> <p style="text-align: center;">Axel Foley 1234 North Crescent Drive Beverly Hills, CA 90210</p> <p>Instructions for Recipient</p> <p><small>This Form 1095-B provides information about the individuals in your tax family (yourself, spouse, and dependents) who had certain health coverage (referred to as "minimum essential coverage") for some or all months during the year. Minimum essential coverage includes government-sponsored programs, eligible employer-sponsored plans, individual market plans, and other coverage the Department of Health and Human Services designates as minimum essential coverage. If an individual in your tax family did not have minimum essential coverage and did not qualify for an exemption from this requirement, that individual shared responsibility payment. Beginning in 2019, individuals will not be responsible for the individual shared responsibility payment because the payment amount is reduced to \$0. However, if individuals in your tax family are eligible for certain types of minimum essential coverage, you may be eligible for a premium tax credit. For more information on the premium tax credit, see Pub. 974, Premium Tax Credit (PTC).</small></p> <p>TIP</p> <p><small>Providers of minimum essential coverage are required to furnish only one Form 1095-B for all individuals whose coverage is reported on that form. As the recipient of this Form 1095-B, you should provide a copy to other individuals covered under the policy if they request it for their records.</small></p> <p>Additional Information For additional information about the tax provisions of the Affordable Care Act (ACA) and the premium tax credit, see www.irs.gov/ACA or call the IRS Healthcare Hotline for ACA questions (800-919-0452).</p> <p>Part I. Responsible Individual, lines 1–9. Part I reports information about you and the coverage.</p> <p>Lines 2 and 3. Line 2 reports your social security number (SSN) or other taxpayer identification number (TIN) if applicable. For your protection, this form may show only the last four digits. However, the coverage provider is required to furnish your complete SSN or other TIN, if applicable, to the IRS. Your date of birth will be entered on line 3 only if line 2 is blank.</p> <p>Line 8. This is the code for the type of coverage in which you or other covered individuals were enrolled. Only one letter will be entered on this line.</p> <p>A. Small Business Health Options Program (SHOP) B. Employer-sponsored coverage C. Government-sponsored program D. Individual market insurance E. Multiemployer plan F. Other designated minimum essential coverage G. Employer-sponsored coverage that is an individual coverage HRA</p> <p>Part II. Employer or Other Coverage Provider, lines 10–22. This part reports information about the coverage provided to you. The employer, employer provided self-funded coverage, government agency providing coverage under a government plan, such as Medicaid or Medicare, or other coverage provider. Line 18 reports a telephone number for the coverage provider that you can call if you have questions about the information reported on the form.</p> <p>Part III. Other or Other Coverage Provider, lines 16–22. This part reports information about the coverage provided to you. The employer, employer provided self-funded coverage, government agency providing coverage under a government plan, such as Medicaid or Medicare, or other coverage provider. Line 18 reports a telephone number for the coverage provider that you can call if you have questions about the information reported on the form.</p> <p>Part IV. Covered Individuals, lines 23–28. This part reports the name, SSN or other TIN, and coverage information for each covered individual. A date of birth will be entered in column (c) only if the SSN or other TIN is not entered in column (b). Column (d) will be checked if the individual was covered for at least one day in every month of the year. For individuals who were covered for some but not all months, information will be entered in column (e) indicating the months for which these individuals were covered. If there are more than six covered individuals, see Part IV, Continuation Sheet(s), for information about the additional covered individuals.</p> </div>																																																							

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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.</p> <p>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> 
