## **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 <u>Direct Access Compatible</u> 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.

#### **Information**

Log into DA Self Service at <u>Direct Access Self Service</u>.

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## **Tax Consent Form**

Introduction

This section provides Retirees, Annuitants, and Former Spouses the procedures for consenting to receive electronic tax documents in Direct Access.

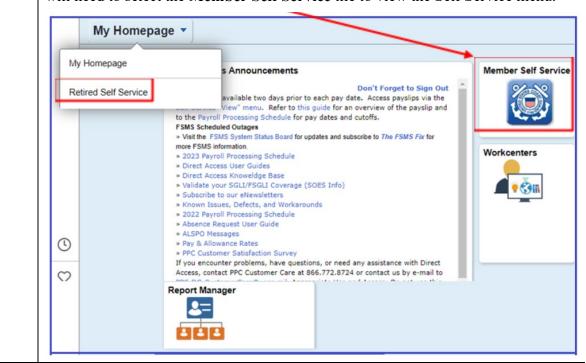
**Procedures** 

See below.

 Step
 Action

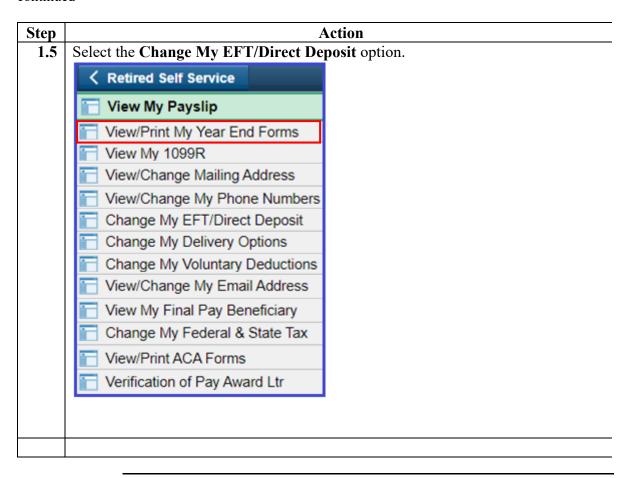
 1
 Select Retiree Self Service from the My Homepage drop-down.

**NOTE:** Some Retirees may have more than one user access; in which case, you will need to select the **Member Self Service** tile to view the Self Service menu.



### Procedures,

continued



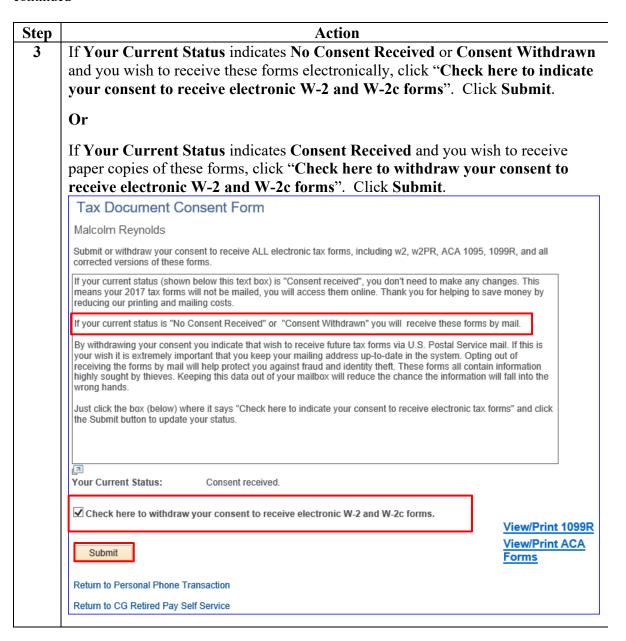
## Procedures,

continued

Step	Action	
2	The Tax Document Consent Form will display.	
	Tax Document Consent Form	
	Malcolm Reynolds	
	Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099 corrected versions of these forms.	9R, and all
	If your current status (shown below this text box) is "Consent received", you don't need to make any chang means your 2017 tax forms will not be mailed, you will access them online. Thank you for helping to save reducing our printing and mailing costs.	
	If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by m	nail.
	By withdrawing your consent you indicate that wish to receive future tax forms via U.S. Postal Service mail your wish it is extremely important that you keep your mailing address up-to-date in the system. Opting out receiving the forms by mail will help protect you against fraud and identity theft. These forms all contain infinighly sought by thieves. Keeping this data out of your mailbox will reduce the chance the information will f wrong hands.	of formation
	Just click the box (below) where it says "Check here to indicate your consent to receive electronic tax form the Submit button to update your status.	s" and click
	Your Current Status: Consent received.	
	-	/iew/Print 1099R
		View/Print ACA Forms
	Return to Personal Phone Transaction	
	Return to CG Retired Pay Self Service	

#### Procedures,

continued



## Procedures,

ep	Action		
	If you elected to change your consent status, the Verify Identity message will display. Enter your Direct Access <b>Password</b> and click <b>Continue</b> .		
	Verify Identity		
	To protect your privacy, verify your identity by typing your password. If you are not this user, click	Cancel.	
	User ID: 9100000		
	Password:		
	Continue		
	Your Current Status will update based on the selection made in Step 3. Clic Return to CG Retired Pay Self Service to return to the home page.	ck	
	Tax Document Consent Form		
	Malcolm Reynolds		
	Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099R, and all corrected versions of these forms.		
	If your current status (shown below this text box) is "Consent received", you don't need to make any changes. This means your 2017 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.		
	If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by mail.		
	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.		
	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.		
	Your Current Status: Consent Withdrawn		
	☐ Check here to withdraw your consent to receive electronic W-2 and W-2c forms.  View/Print	1099R	
	Submit		
	Forms		
	Return to Personal Phone Transaction		
1	Return to CG Retired Pay Self Service		

## View/Print 1099R

#### Introduction

This section provides Retirees, Annuitants, and Former Spouses with the procedures to view, print, and/or save a 1099R in Direct Access.

### **Procedures**

See below.

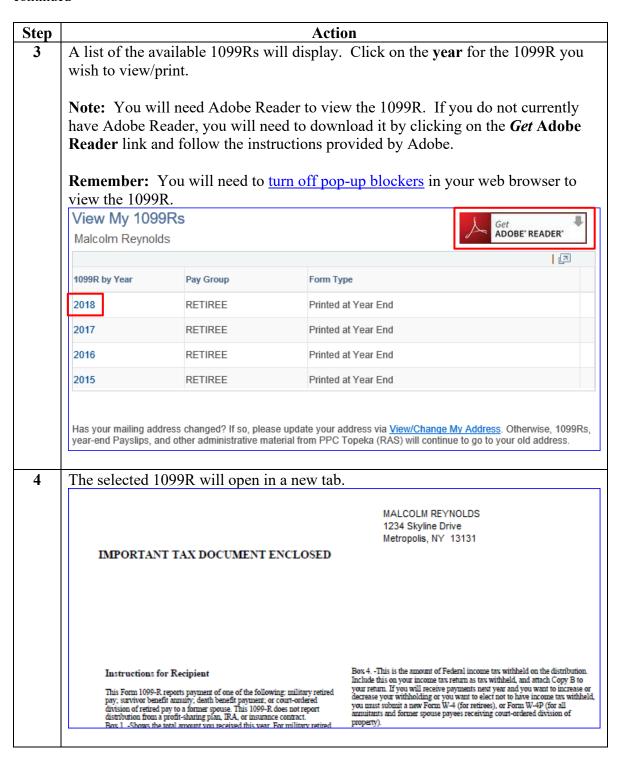
p	_	Action	
	There are two ways to access <b>End Forms</b> or 2) Select <b>View</b>	,	View/Print My Year
	Note: Some Retirees may ha need to select the Self Service		•
	My Page Self Service Requests	s <b>*</b>	
		orm the functions listed below.	
	Please note: Pay slips and 1099R forms will open in a new window. Turn off the pop-up blocker in your web browser to view pay slips and 1099R forms. In Internet Explorer, click on Tools to access the pop-up blocker options.		
	View My Payslip This link will take you to a list of all available payslips to view and/or download.	View/Print My Year End Forms Affirmative consent to receive only an electronic copy of Year-End Tax Forms.	
	View My 1099R This link will take you to a list of all available 1099R tax documents to view and/or download.	View/Change Mailing Address View and make changes to your mailing address. PPC uses the mailing address to send communications, payroll, and tax documents to you.	
	View/Change My Phone Numbers Self-service users will use this link to view, add, or update their phones numbers.	Change My EFT/Direct Deposit This link will take you to view and/or change your EFT/Direct Deposit.	
	Change My Delivery Options This link will allow you to change delivery options for communications.	Change My Voluntary Deductions This link will take you to view, add, change, or stop your voluntary deductions.	
	View/Change My Email Address This link will take you to view and/or change your email addresses stored in the Retired Payroll system.	Change My Password This link will allow you to change your password and set your Forgot Password security question/answer.	
	View My Final Pay Beneficiary Self-service users will use this link to view their Final Pay Beneficiaries	Change My Federal & State Tax Review or change your W-4 information.	
	View/Print ACA Forms View/Print ACA Forms		

## Procedures,

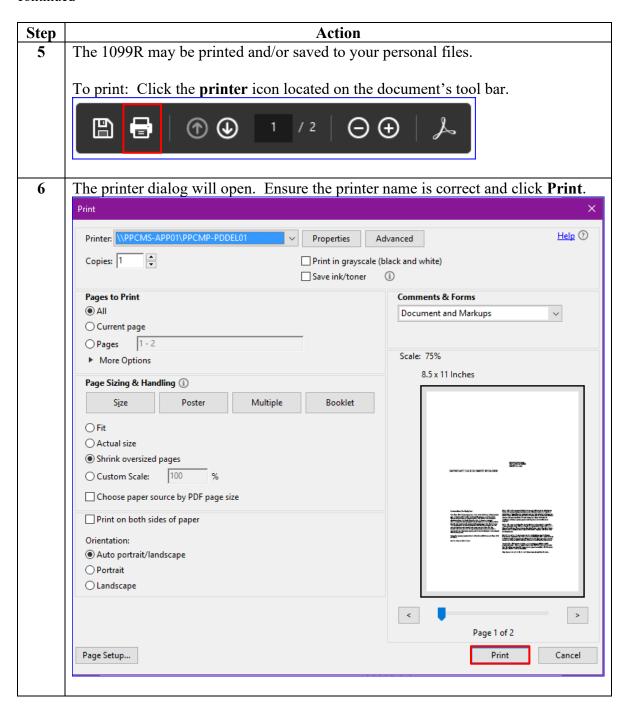
continued

Step	Action
2	The Tax Document Consent Form will display. To access the 1099R forms, click <b>View/Print 1099R</b> .
	Tax Document Consent Form
	Malcolm Reynolds
	Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099R, and all corrected versions of these forms.
	If your current status (shown below this text box) is "Consent received", you don't need to make any changes. This means your 2017 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.
	If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by mail.
	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.  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.
	Your Current Status: Consent Withdrawn
	☐ Check here to withdraw your consent to receive electronic W-2 and W-2c forms.  View/Print 1099R
	Submit View/Print ACA Forms
	Return to Personal Phone Transaction
	Return to CG Retired Pay Self Service

#### Procedures,



#### Procedures,



## Procedures,

Step	Action
7	To save the document to your computer, click the <b>disk</b> icon located on the document's tool bar.
8	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. To return to the Self Service menu, click the <b>House</b> icon in the upper right corner of the page.  United States Coast Guard US. Department of Hornsland Security

## View/Print Affordable Care Act (ACA) Forms

#### Introduction

This section provides Retirees, Annuitants, and Former Spouses with the procedures to view, print, and/or save Affordable Care Act (ACA) forms in Direct Access.

#### **Procedures**

See below.

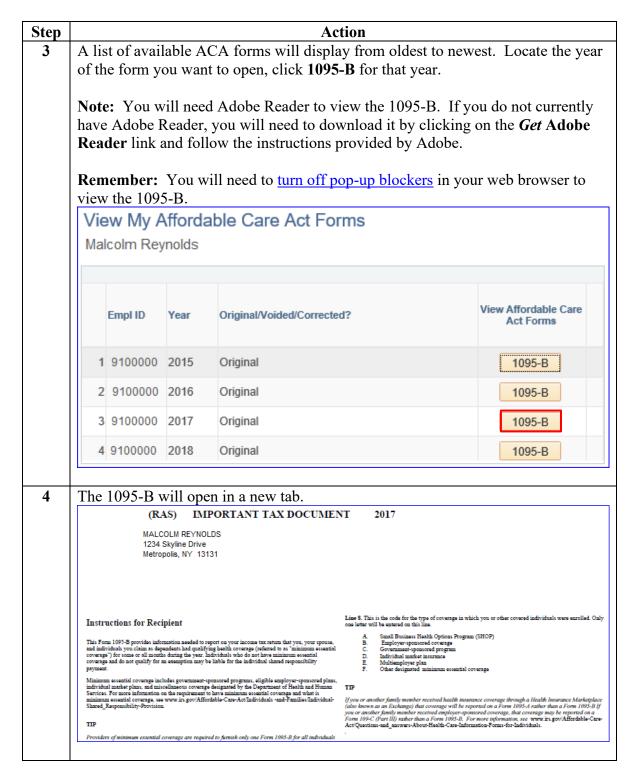
ep		Action	
l	There are two ways to acces View/Print My Year End I	,	
	<b>Note:</b> Some Retirees may he need to select the <b>Self Servi</b>		· · · · · · · · · · · · · · · · · · ·
	My Page Self Service Requests	s <b>🌣</b>	
		orm the functions listed below. PPC at 1-866-772-8724.  It the "View/Print My Year End Forms" ructions for updating your "electronic will open in a new window. Turn off the	
	Internet Explorer, click on Tools to accest View My Payslip This link will take you to a list of all available payslips to view and/or download.		
	View My 1099R This link will take you to a list of all available 1099R tax documents to view and/or download.	View/Change Mailing Address View and make changes to your mailing address. PPC uses the mailing address to send communications, payroll, and tax documents to you.	
	View/Change My Phone Numbers Self-service users will use this link to view, add, or update their phones numbers.	Change My EFT/Direct Deposit This link will take you to view and/or change your EFT/Direct Deposit.	
	Change My Delivery Options This link will allow you to change delivery options for communications.	Change My Voluntary Deductions This link will take you to view, add, change, or stop your voluntary deductions.	
	View/Change My Email Address This link will take you to view and/or change your email addresses stored in the Retired Payroll system.	Change My Password This link will allow you to change your password and set your Forgot Password security question/answer.	
	View My Final Pay Beneficiary Self-service users will use this link to view their Final Pay Beneficiaries	Change My Federal & State Tax Review or change your W-4 information.	
	View/Print ACA Forms View/Print ACA Forms		

## Procedures,

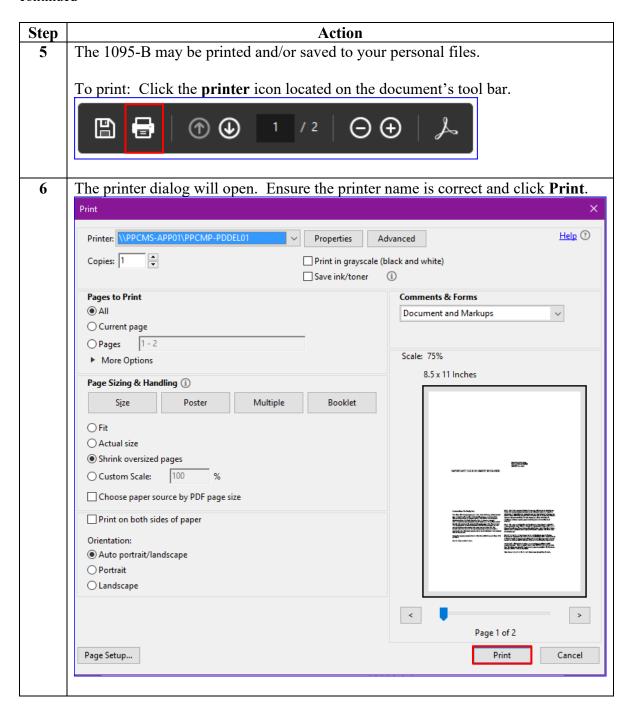
continued

Step	Action		
2	The Tax Document Consent Form will display. To access the ACA forms, clients		
	View/Print ACA Forms.		
	Tax Document Consent Form		
	Malcolm Reynolds		
	Submit or withdraw your consent to receive ALL electronic tax forms, including w2, w2PR, ACA 1095, 1099R, and all corrected versions of these forms.		
	If your current status (shown below this text box) is "Consent received", you don't need to make any changes. This means your 2017 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.		
	If your current status is "No Consent Received" or "Consent Withdrawn" you will receive these forms by mail.		
	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.  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.		
	Your Current Status: Consent Withdrawn		
	Todi Carront Status.		
	☐ Check here to withdraw your consent to receive electronic W-2 and W-2c forms.  View/Print 1099R		
	Submit View/Print ACA Forms		
	Return to Personal Phone Transaction		
	Return to CG Retired Pay Self Service		

#### Procedures,



### Procedures,



## Procedures,

Step	Action	
7	To save the document to your computer, click the <b>disk</b> icon located on the	
	document's tool bar.	
8	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. To return to the Self	
	Service menu, click the <b>House</b> icon in the upper right corner of the page.	
	United States Coast Guard U.S. Dispatries of Homeland Security  Control of Homeland Security	