

BACKGROUND: Federal retirees received a notice from OPM (Office of Personnel Management) stating they will no longer receive a paper 1099-R in the mail. Retirees can either **DOWNLOAD** an electronic copy (and find a way to print it) **or request that a paper check be mailed.**

TO DOWNLOAD A COPY

(1) Use the 1099-R request tool to print your 1099-R. No login needed

- Go to <https://www.serviceline.opm.gov/1099-request>
- Enter your zip code and claim number – found on your Initial welcome letter
retirement card
annuity payment statements
1099-R tax form from last year
- Check your email for the download link
- Click the link in the email
- Re-enter your information and click Download 1099-R
- **You will need to have or find a way to print your 1099-R**



(2) Print the 1099-A from your personal OPM account.

- Go to <https://www.serviceline.opm.gov/>
- Click 1099-R Tax Form in the menu
- Click the 1099-R link for the tax year you want



If you want **to go back to receiving a paper copy of the 1099-R from OPM by mail** you must **notify OPM in order to change your preference.**

Note: OPM will then send your tax form to the address they have on file. If OPM does not have your current email address on file you will need to update that.

Option 1: federal retirees can try calling the Retirement Services hotline at **888-767-6738** to request the PAPER 1099-R. This may involve a long wait time, so patience may be needed.

Phone: 1-888-767-6738

TTY: 711

Hours: Monday thru Friday, 7:40 a.m. to 5:00 p.m. ET

Closed on federal holidays

The busiest time is between 10:30 a.m. and 1:30 p.m. ET.

Option 2: Write to OPM [this will likely delay you receiving your 1099-R].

Please make sure your first and last name, phone number, email address, claim number, and signature are included in any inquiries or documents you mail to OPM. They usually respond within 1 to 3 weeks after OPM receives your mail.

Retirement Operations Center
U.S. Office of Personnel Management
Post Office Box 45
Boyers, PA 16017

Option 3 (if you have access to a computer or smartphone): Login to (or create) your personal OPM account to change your preference of how you receive your 1099-R back to receive by “Postal Mail”

You must have an online account set up with OPM Retirement Services Online. If you need to set-up your online OPM account this requires a few steps. First, if you do not already have an email address you will need that. A trusted relative or lawyer can help set up a free email account. With an email and your claim number, you can print the 1099-R with no login [see “Option A” below]. You must first create your own personal codes in Login.gov at this website/link [<https://login.gov/create-an-account/>]. Note: be sure to save your new codes for logging in to Login.gov in a safe and secure location. OPM requires annuitants to use Login.gov to log into OPM. Once you have set up your personal codes at Login.gov, the second step is to log into OPM at this website link: [<https://www.serviceline.opm.gov>] to set up your OPM online account.

Once you have set up your account and you have logged into OPM (at <https://www.serviceline.opm.gov>) you will need to go to where it says, “See the 1099-R Preferences section of your Profile page” (see how to do that below).

Once you are logged in to the OPM Retirement Center, on the left side of your computer screen there is a list of options (to open another page). Click on the second option down called, “Profile”.

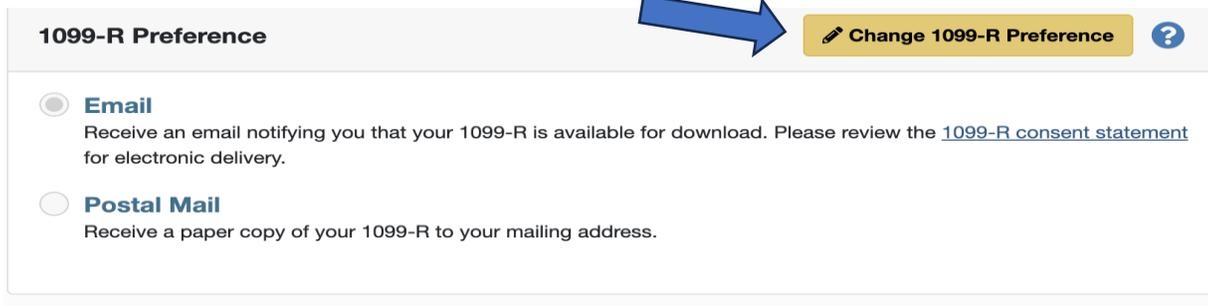


Clicking “Profile” opens a new window that allows you to choose how you want to receive your 1099-R tax document. [this is the third option down on the list]

According to information provided by OPM on their website:

- You can choose to receive your 1099-R by Email or Postal mail.
- If you select Email, you will receive an email notifying you that your 1099-R is available, but you will not receive a paper copy of your 1099-R statement. You will need to have a way to print your 1099-R from this email.
- If you select Postal mail, you will receive a paper copy of your 1099-R to your mailing address.

Click on “Change 1099-R Preference” (in the upper right side, see next page for help with this).

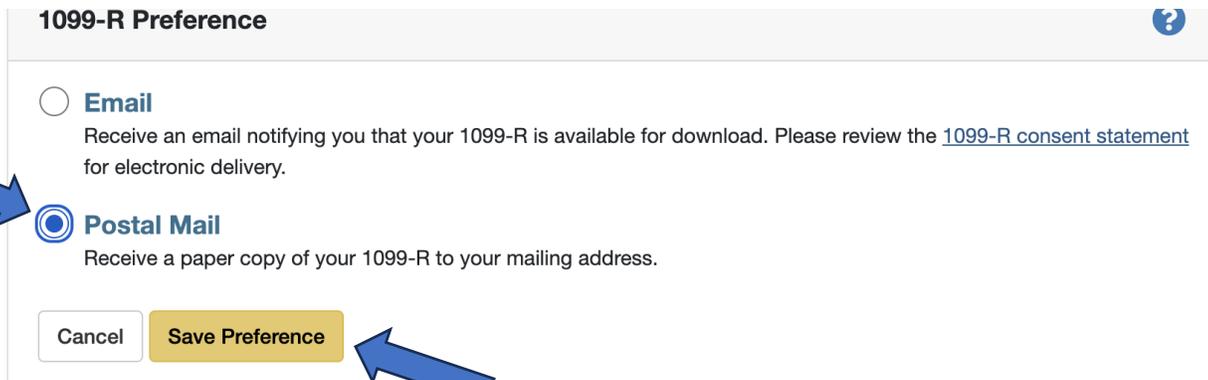


1099-R Preference Change 1099-R Preference ?

Email
Receive an email notifying you that your 1099-R is available for download. Please review the [1099-R consent statement](#) for electronic delivery.

Postal Mail
Receive a paper copy of your 1099-R to your mailing address.

To receive your 1099-R by mail, click on “Postal Mail”. Then click on “Save Preference” to save how you prefer to receive your 1099-R. [Note: OPM has set “Email” as the preference for all users, so you only need to change your preference if you want to receive a paper copy of your 1099-R by mail.]



1099-R Preference ?

Email
Receive an email notifying you that your 1099-R is available for download. Please review the [1099-R consent statement](#) for electronic delivery.

Postal Mail
Receive a paper copy of your 1099-R to your mailing address.

Cancel Save Preference