

The following is to answer the questions from NARFE members concerning the “digital version” of the 1099-R form.

This is the answer to the 1099 question for all members.

**Carol R. Ek
Region V Vice President**

Subject: Inquiries about electronic 1099Rs from OPM

We have had several contacts from members and officers about the message OPM included in this year’s annual annuity adjustment notice that in 2014 only electronic 1099Rs would be available. We asked OPM to clarify the message since there was no mention of a mailing option for these forms in its notice. OPM told us that while the agency is urging all retirees to use either Services-Online or have their 1099Rs sent to them via email, there would be future messages sent by OPM this year that will provide a procedure for annuitants and survivors to 1) stop receiving a paper 1099R and 2) “Opt-in” for receiving their 1099Rs electronically. We are interpreting this to mean annuitants can still receive their 1099Rs in 2014 by mail if they do not elect to receive them electronically. OPM said it “will continue to work with all annuitants to ensure they get the information they desire in the format they find useful, to the maximum extent possible.”

Here is the message that will be included on the health benefit annuitant notices to annuitants and survivors later this month:

Coming Soon: Electronic 1099R Income and Tax Withholding Statement

Later this year OPM will be asking annuitant and survivor beneficiaries to visit Services Online to Opt-In to receive the 2014 1099R electronically. Accessing Services Online allows you to receive your 1099R instantly. Watch for more information in the coming months!

In the meantime, if you haven’t gone into Services Online lately, please prepare for the upcoming online elections and check on your annuity status and so much more by going to <https://www.servicesonline.opm.gov/>. Don’t worry if you don’t remember your password, if you don’t have it, you can request one once you access Services Online.

While in Services Online, register your e-mail address to receive updates throughout the year. You will also be able to receive your password change via e-mail if you have a valid e-mail address associated with Services Online.

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