

OPM changes the 1099-R process



Dan Toth

The Office of Personnel Management (OPM) sends Federal Employees Retirement System (FERS) and Civil Service Retirement System (CSRS) annuitants their monthly pensions. As the administrator of our retirement benefits, OPM is required to provide tax form 1099-R annually by Jan. 31. Without this form, retirees can't complete their taxes. A change at OPM has disrupted this process.

In the past, OPM simply mailed the 1099-R to every annuitant. Annuitants didn't need to do anything. They didn't need to request the form, call OPM, or

download it. And they were sure they wouldn't miss it because of the importance of physical mail. The system worked great.

However, this year, OPM made a change without warning, to the detriment of retirees. OPM decided that it would no longer mail the 1099-R form to anybody who has a Services Online account (OPM's retirement portal). I can only guess the price of a stamp, and therefore supporting another federal agency that provides a living for hundreds of thousands of Americans, was a bridge too far. Instead, OPM is requiring annuitants to receive their form electronically, and the responsibility has shifted to the annuitant to do so.

If you need your 1099-R, go to servicesonline.opm.gov and use the 1099-R tool that does not require a login, or if you do log in, you can download the form. If you don't have access to a computer, you can call the NALC Retirement Department, and we will assist you.

The NALC Retirement Department can be reached by calling 800-424-5186 (toll free) Monday, Wednesday or Thursday, 10 a.m. to noon or 2 p.m. to 4 p.m. (Eastern time), or by calling the NALC Headquarters switchboard at 202-393-4695 Monday through Friday, 9 a.m. to 4 p.m. (Eastern time) and asking for the Retirement Department.

I believe this change by OPM is terrible. It should absolutely mail the 1099-R to each and every annuitant. As I always write, federal retirees should be receiving the best customer service possible. Instead of asking how the agency can save less than \$1 per annuitant,

it should be asking how it can better serve America's retired federal workforce for their years of dedicated service to the public. I have written a letter to OPM requesting that it backtrack and return to the old process that worked year after year.

The Retirement Department has been flooded with calls by people who have not received their 1099-R and simply can't get through to OPM when they call. I make sure to tell each member they should call their congressional representative and express their frustration with OPM. If you've been negatively affected by this change or the inability to receive assistance at OPM, I encourage you to do the same. There seems to be some traction on Capitol Hill. Recently, nine House Democrats wrote to OPM regarding this issue and OPM's failure to provide even the most basic service. Let's keep up the pressure until OPM corrects course.

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Another item we need to keep pressure on is the Federal Retirement Fairness Act (H.R. 1522). This bill would positively affect a majority of our craft by allowing active employees who were employed as casuals, transitional employees or city carrier assistants after 1988 to make a deposit or "buy back" their service to make it creditable service under FERS. Adding months or years to your creditable service can potentially help you retire earlier and retire with a higher annuity. More importantly, this bill would make those years of non-career service mean more than just a paycheck. H.R. 1522 currently has 125 co-sponsors. Make sure you check out the Legislative Action Center on nalc.org and take action.