Retirement Online User Guide

Important Documents

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Introduction

This user guide outlines the steps to view important documents in *Retirement Online*; these documents include your annual statement, 1099-R tax form, income verification, and other correspondence.

View Member Annual Statement

Sign in to *Retirement Online* and follow the steps below.

Step	Action
1.	In the *My Account Summary* section, click **View Member Annual Statement**.
2.	The *My Member Annual Statement* page will open. Enter the year you want to see. Click **Generate MAS**.
3.	Your Member Annual Statement will download to your computer. Locate the file on your device to open it.
4.	Click **Back** to return to the *Retirement Online Account Homepage*.

View Retiree Annual Statement

Sign in to *Retirement Online* and follow the steps below.

Step	Action
1.	In the *My Account Summary* section, click **View Retiree Annual Statement**.
2.	The *My Retiree Annual Statement* page will open. Enter the **Calendar Year** you want to view. Click **Generate Statement**.
3.	Your Retiree Annual Statement will download to your computer. Locate the file on your device to open it.
4.	Click **Back** to return to the *Retirement Online Account Homepage*.

Generate Mortgage Verification Letter

Sign in to *Retirement Online* and follow the steps below.

Step	Action
1.	In the *My Account Summary* section, click **Generate Retirement Account Letter**.
2.	The *Mortgage Letter page* will open. Click **OK**.
3.	Your *Mortgage Letter* will appear in a pop-up. You can save or print a copy for your records. When you are done viewing the letter, click **Close (X)**; you will return to the *Retirement Online Account Homepage*.

Generate Income Verification Letter

Sign in to *Retirement Online* and follow the steps below.

Step	Action
1.	In the *My Account Summary* section, click **Generate Pension Income Letter**.
2.	The *Income Verification Letter page* will open. Click **OK**.
3.	Your *Income Verification Letter* will appear in a pop-up. You can save or print a copy for your records. When you are done viewing the letter, click **Close (X)**; you will return to the *Retirement Online Account Homepage*.

View and Print 1099-R Tax Form

Sign in to *Retirement Online* and follow the steps below.

Step	Action
1.	In the *My Account Summary* section, click **Get 1099-R Tax Forms**. *If you have more than one account type with NYSLRS, you will need to select the tab of the applicable account in the My Account Summary section prior to clicking* ***Manage My 1099-R Tax Forms****.*
2.	The *1099-R Tax Form* page will open. Select the ***Year** of the 1099-R you want to view and/or print. *1099-R forms are only available for tax year 2023 and later. If you have questions about a prior tax year, please contact NYSLRS at (866) 805-0990 for additional information.* Click **Generate** to view the 1099-R for the year selected. *Wait while the system processes the request.*

Step	Action
3.	Your 1099-R form will open in a new browser. *If there are multiple 1099- Rs, a zip file will generate and download to your computer. Follow the instructions on the pop-up message to view the 1099-Rs. Click **OK** to close the message.* *To print the 1099-R, click **Print** from your browser.* To close the document and return to *Retirement Online*, click **Close (X)**.
4.	To return to the *Retirement Online Account Homepage*, click **Back to Home**.

Find Documents and Correspondence

Sign in to *Retirement Online* and follow the steps below.

Step	Action
1.	In the *My Account Summary* section, click **Find Documents & Correspondence**.
2.	The *Document Search (All)* page will open. To open a document, click on the applicable **Document** name.
3.	Your document will download to your computer. Locate the file on your device to open it.
4.	Click **Account Homepage** to return to the *Retirement Online Account Homepage*.