

Retirement Online User Guide

Tax-Related Information

Revised: 07/2026

Introduction

This user guide shows you how to view and print your 1099-R federal tax filing form, as well as update your W-4P tax form using *Retirement Online*.

Get 1099-R Tax Form

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

Step	Action
1.	In the <i>My Account Summary</i> section, click on Get 1099-R Tax Forms . <i>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.</i>
2.	The <i>1099-R Tax Form</i> page will open. Select the *Year of the 1099-R you want to view and/or print. <i>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.</i> Click Generate to view the 1099-R for the year selected. <i>Wait while the system processes the request.</i>
3.	Your 1099-R form will open in a new browser. <i>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.</i> <i>To print the 1099-R, click Print from your browser.</i> To close the document and return to <i>Retirement Online</i> , click Close (X) .
4.	To return to the <i>Retirement Online Account Homepage</i> , click Back to Home .

Update Federal Tax Withholding

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

Step	Action
1.	In the <i>My Account Summary</i> section, click Update Federal Tax Withholding . <i>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 Update Federal Tax Withholding.</i>
2.	The <i>W-4P Withholding Certificate for Periodic Pensions and Annuity Payments</i> page will open. To update your information, click on the appropriate field and make the necessary corrections. If you do not want any federal income tax withheld, click the ' Check here if... '. Click Submit .
3.	A <i>Warning</i> pop-up will appear. Click OK .
4.	The <i>Submission Confirmation</i> page will open. Click OK .

Tools & Related References

IRS Form [W-4P](#)