

# Form RRB-1099-R Distributions



**TaxSlayer Navigation:** Federal Section>Income>1099-R, RRB-1099, RRB-1099-R, SSA-1099>RRB-1099-R; or Keyword "RR"

Railroad Retirement Benefits (RRB) are reported on two forms and require two entry screens. Social Security Equivalent Benefits, Form RRB 1099 Tier 1 (Blue Form) are entered on the Social Security Benefits screen. Treat the benefits reported on the Blue Form just like the information reported on Form SSA-1099. The screenshot below shows the entry screen for Form RRB 1099-R Tier 2 (Green Form).

**Note:** See Publication 915, Social Security and Equivalent Railroad Retirement Benefits, and Publication 575, Pensions and Annuity Income, for additional information.

## RRB-1099-R

### Whose RRB-1099-R is this?

**Recipient \***

Taxpayer Sample

Spouse Sample

### Payer Information

**Payer's ID \***

-

**Payer Name \***

Check here if foreign address

**Address (street number & name) \***

**ZIP code \***

-

**City, town, or post office \***

**State \***

- Please Select - ▼

**Phone Number**

\* Optional

( ) - -

### Recipient Information

Check here if foreign address

**Address (street number & name) \***

1530Papaya Street

### RRB-1099-R Information

**3 Total employee contributions**

\$

**4 Contributory Amount Paid**

Not needed for e-filing

**5 Vested Dual Benefit**

Not needed for e-filing

**6 Supplemental Annuity**

Not needed for e-filing

**7 Total Gross Paid \***

\$

**7a Taxable Amount**

\$

Does not carry to Form 8880

Do you need to calculate your taxable amount?  
Click here for options.

**8 Repayments**

Not needed for e-filing

**9 Federal income tax withheld**

\$

**10 Rate of Tax**

Not needed for e-filing

**11 Country**

Not needed for e-filing

**12 Medicare Premium Total**

Not needed for e-filing

Check here to report on Form 1040, Line 1

↑ Taxable amount may have to be determined using Simplified Method.

Generally, for a joint and survivor annuity, use the combined ages to calculate the taxable amount for the employee's pension. As a reminder, place a note with the combined ages used for carry forward purposes.

For a joint and survivor annuity that starts BEFORE the death of either beneficiary, continue with the same combined age after the first death. For a survivor annuity that starts AFTER the death of the employee, use only the survivor's age.

# Form SSA-1099/RRB-1099 Tier 1 Distributions



**TaxSlayer Navigation:** Federal Section>Income>1099-R, RRB-1099, RRB-1099-R, SSA-1099>Social Security Benefits/RRB-1099; or keyword "SSA"

## Social Security SSA-1099/RRB-1099 Tier I

Taxpayer's Social Security Benefit (Generally Box 5 of Form SSA-1099)

\$

Taxpayer's Federal Tax Withheld (Amount from Box 6 of Form SSA-1099)

\$

Taxpayer's Medicare Premiums

\$

Spouse's Social Security Benefit (Generally box 5 of Form SSA-1099)

\$

Spouse's Federal Tax Withheld (Amount from Box 6 of Form SSA-1099)

\$

Spouse's Medicare Premiums

\$

Lump-Sum Payments

Enter amount from Box 5 of Form SSA-1099 or from Form RRB-1099 - Tier 1 (Blue form) Net Social Security Equivalent Benefits (SSEB).

Be sure to check for any tax withheld. Often taxpayers choose this option. This is found in Box 6 of the SSA-1099 and Box 10 of the RRB-1099.

Enter the total of Medicare Parts A, B, C, and D. Repeat for spouse. If Medicare premiums have been used for the Self Employed Health Insurance deduction, do NOT enter on this screen.

If an amount is present in the description of Box 3 on Form SSA-1099, or Boxes 7, 8 and 9 on Form RRB-1099, the taxpayer received benefits attributable to a prior year. If the taxpayer is able to provide prior year tax returns, use the Social Security Lump-Sum Payment worksheet on the next page to see if the taxable amount of social security is reduced.