

Form RRB-1099-R Distributions

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 this form just like the information reported on Form SSA-1099. This screenshot shows the entry screen for Form RRB 1099-R Tier 2 (Green Form).

RRB-1099-R

Payer Information

Payer's ID
 -

Name

Check here if foreign address

Address (Number and Street)

Zip Code
 -

City, Town, or Post Office

State
- Please Select - ▾

Recipient Information

Recipient
 Mr Taxpayer
 Mrs Taxpayer

Check here if foreign address

Address (Number and Street)
123 Main St

Zip Code
90210 -

City, Town, or Post Office
Beverly Hills

State
California ▾

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
\$

Do you need to figure your taxable amount using the Simplified Method? Click here for the worksheet.
[Worksheet](#)

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 7

Taxable amount may have to be determined using Simplified Method.

Form SSA-1099 Distributions

Social Security 1099 SSA

Social Security Benefits

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 enter from Form RRB-1099 - Tier 1 (Blue form) Social Security Equivalent Benefits (SSEB)

Be sure to check for any tax withheld. Often taxpayers choose this option.

Enter the total of Medicare Parts A, B, C, and D. Repeat for spouse.

If an amount is present in the description of Box 3 on Form SSA-1099, the taxpayer received benefits attributable to a prior year. Consider using the Lump-Sum worksheet to see if the taxable amount of social security is reduced.

If Lump-Sum calculation is needed, click here. Taxpayer will need to provide prior year tax returns.

Form SSA-1099 Lump-Sum Distributions

Social Security Lump-Sum Payment

SSA Lump-Sum Payment

Year the lump sum payment was made for: 2014

Filing Status in Earlier Year: - Please Select -

SSA Payments received in Earlier Year: - Please Select -

Portion of this years SSA for Earlier year: Single

Modified Adjusted Gross Income for Earlier Year: Married Filing Joint

Taxable Benefits Reported in Earlier Year: Married Filing Separate

Head of Household

Qualifying Widow(er) with Dependent Children

\$

Enter relevant year, as shown on Form SSA-1099.

If more than one year has prior year payments use additional Lump-Sum worksheet.

Dropdown is available for prior year Filing Status

Social Security Lump-Sum Payment

SSA Lump-Sum Payment

Year the lump sum payment was made for: 2014

Filing Status in Earlier Year: - Please Select -

SSA Payments received in Earlier Year: \$

Portion of this years SSA for Earlier year: \$

Modified Adjusted Gross Income for Earlier Year: \$

Taxable Benefits Reported in Earlier Year: \$

Cancel Continue

Choose proper answers for all boxes. Leave the 3rd and/or 6th box empty if not applicable. All other boxes require entries.

The calculation won't be correct without the prior year AGI.

The software will determine total taxable Social Security based on these entries.