

Accessing 1099-R from the MemberDirect Portal

1. Log in to the [MemberDirect Portal](#)
2. Go to “1099-R” and click on “click to view 1099” to view the 1099 for that year.

The screenshot displays the MemberDirect Portal interface. At the top, a dark blue header bar contains the City of San Jose logo on the left and the text "Early Retirement (Active)" with a dropdown arrow on the right. Below the header, a left-hand navigation menu lists various options: "Benefit Information", "Benefit Summary", "Benefit Payment History", "Withholding Elections", "Direct Deposit Elections", "Year to Date", "1099-R" (highlighted with a red box), "Contact Information", "Demographics", and "Beneficiaries". The main content area is titled "1099-R Information" (also highlighted with a red box). It features two side-by-side panels for the years 2025 and 2024. Each panel lists the following fields: Status, Gross Distr, Taxable Amt, Fed Withheld, State Withheld, Distr Code, Employee Contr, and Distr %. The data for these fields is obscured by black redaction boxes. A red arrow points from the "1099-R" menu item to the "Click to View 1099" link located below the 2025 panel's redacted data.

Year	Status	Gross Distr	Taxable Amt	Fed Withheld	State Withheld	Distr Code	Employee Contr	Distr %	Action
2025	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Click to View 1099
2024	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Click to View 1099