

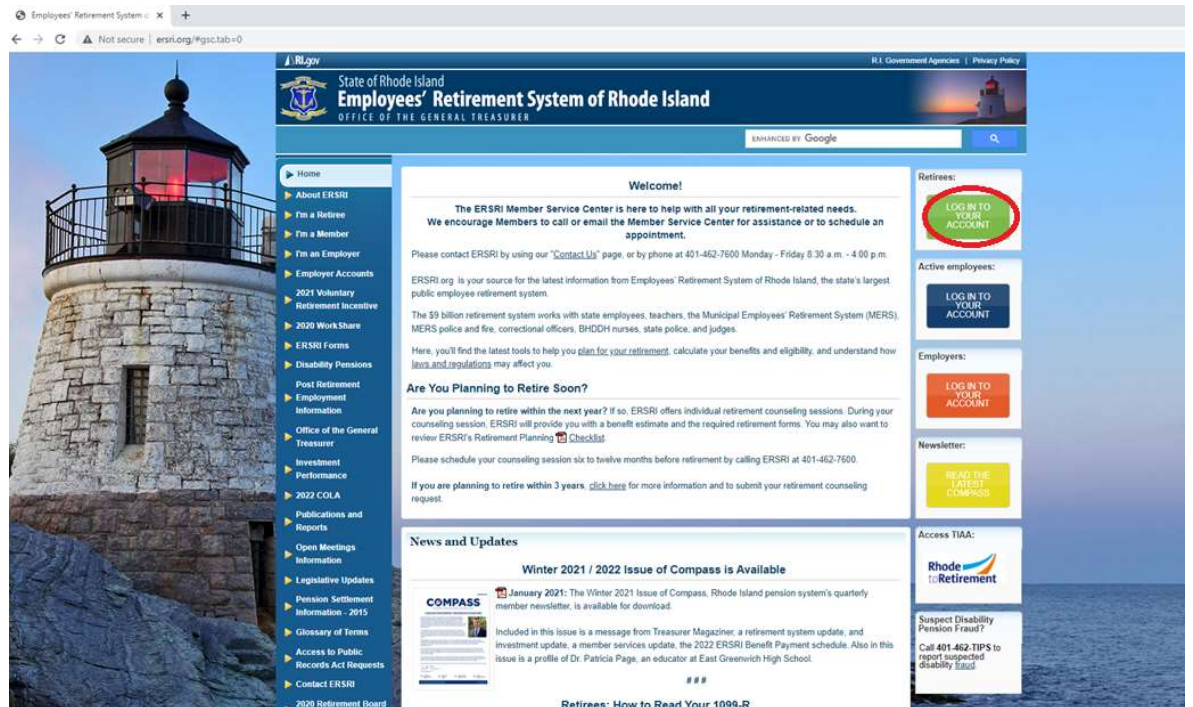


# How to Change Tax Election Online

For Retirees of the  
Employees' Retirement System of Rhode  
Island

Navigate to  
[www.ersri.org](http://www.ersri.org)

Click on the  
Retirees link to the  
right “Log in to  
your Account”



Employees' Retirement System of Rhode Island

State of Rhode Island  
Employees' Retirement System of Rhode Island  
OFFICE OF THE GENERAL TREASURER

Home

- About ERSRI
- I'm a Retiree
- I'm a Member
- I'm an Employer
- Employer Accounts
- 2021 Voluntary Retirement Incentive
- 2020 WorkShare
- ERSRI Forms
- Disability Pensions
- Post Retirement Employment Information
- Office of the General Treasurer
- Investment Performance
- 2022 COLA
- Publications and Reports
- Open Meetings Information
- Legislative Updates
- Pension Settlement Information - 2015
- Glossary of Terms
- Access to Public Records Act Requests
- Contact ERSRI
- 2020 Retirement Board

Welcome!

The ERSRI Member Service Center is here to help with all your retirement-related needs. We encourage Members to call or email the Member Service Center for assistance or to schedule an appointment.

Please contact ERSRI by using our "Contact Us" page, or by phone at 401-462-7600 Monday - Friday 8:30 a.m. - 4:00 p.m.

ERSRI.org is your source for the latest information from Employees' Retirement System of Rhode Island, the state's largest public employee retirement system.

The \$9 billion retirement system works with state employees, teachers, the Municipal Employees' Retirement System (MERS), MERS police and fire, correctional officers, BHOH nurses, state police, and judges.

Here, you'll find the latest tools to help you [plan for your retirement](#), calculate your benefits and eligibility, and understand how [laws and regulations](#) may affect you.

**Are You Planning to Retire Soon?**

Are you planning to retire within the next year? If so, ERSRI offers individual retirement counseling sessions. During your counseling session, ERSRI will provide you with a benefit estimate and the required retirement forms. You may also want to review ERSRI's Retirement Planning [Checklist](#).

Please schedule your counseling session six to twelve months before retirement by calling ERSRI at 401-462-7600.

If you are planning to retire within 3 years, [click here](#) for more information and to submit your retirement counseling request.

**News and Updates**

**Winter 2021 / 2022 Issue of Compass is Available**

January 2021: The Winter 2021 issue of Compass, Rhode Island pension system's quarterly member newsletter, is available for download.

Included in this issue is a message from Treasurer Magaziner, a retirement system update, and investment update, a member services update, the 2022 ERSRI Benefits Payment schedule. Also in this issue is a profile of Dr. Patricia Page, an educator at East Greenwich High School.

Retirees: How to Read Your 1099-R

**Retirees:**

[LOG IN TO YOUR ACCOUNT](#)

**Active employees:**

[LOG IN TO YOUR ACCOUNT](#)

**Employers:**

[LOG IN TO YOUR ACCOUNT](#)

**Newsletter:**

[READ THE LATEST CHANGES](#)

**Access TIAA:**

[Rhode Retirement](#)

**Suspect Disability Pension Fraud?**

Call 401-462-TIPS to report suspected disability fraud.

# Click the link “Click here to log in to your account”

RI.gov R.I. Government Agencies | Privacy Policy

State of Rhode Island  
**Employees' Retirement System of Rhode Island**  
OFFICE OF THE GENERAL TREASURER

ENHANCED BY Google

Home  
About ERSRI  
I'm a Retiree  
I'm a Member  
I'm an Employer  
Employer Accounts  
2021 Voluntary Retirement Incentive  
2020 WorkShare  
ERSRI Forms  
Disability Pensions  
Post Retirement  
Employment Information  
Office of the General Treasurer  
Investment Performance

### Retiree Login

You can learn more about how to access and use your ERSRI account by downloading [this guide](#).

**CLICK HERE TO LOG IN TO YOUR ACCOUNT**

The first time you click this button, you will need to self-register into our new site. The new site will provide you with a Login ID. Please save both your Login ID and the password you create and keep them in a safe place.

You can learn more about how to access and use your ERSRI account by downloading [this guide](#).

Once you have registered, you will now be able to:

- Update your mailing address, phone number and e-mail address.
- Make real-time tax changes to your account. (Please note that to have a flat tax amount, you'll need to put in a number of dependents and then you can adjust the additional amount field to fit your specific tax deduction amount. There is a tax calculator on the new login page to determine the deduction based on marital status and dependents.)

If you would like to make changes to your direct deposit information or set up a new direct deposit, please complete and return ERSRI's [direct deposit form](#).

If you encounter any issues trying to log into the new payment site, please contact ERSRI customer service [via e-mail](#) or by phone at 401-462-7600 (toll-free #4) and we'll be happy to assist you!

Retirees:  
**LOG IN TO YOUR ACCOUNT**

Active employees:  
**LOG IN TO YOUR ACCOUNT**

Employers:  
**LOG IN TO YOUR ACCOUNT**

Newsletter:  
**READ THE LATEST NEWS**

# Enter your Login ID and Password

## Sign In

Login ID:

Password:

[Forgot your password?](#)  
[Self-registration](#)  
[Forgot login id?](#)

Sign In

**Login:**  
Please enter your login ID and password to access the site.

**First Time Users:**  
If this is your first time on the site, please click the Self-Registration link to create an online account.


**Forgot Your Password or Login ID:**  
Please click the appropriate link under the login to access your credentials.


If you are still unable to access your account, please contact ERSRI at 401-462-7600, Monday through Friday between 8:30 a.m. and 4 p.m. for assistance.


Contacts & Resources | Terms of Use | Privacy Policy


© Morneau Shepell Ltd., 2015-2016

Click on your Plan to the right  
Examples: ERS, MERS, SPRBT or JRBT

 **Employees' Retirement  
System of Rhode Island**


 [Log out](#)

Search 



## My Retirement

**WELCOME**  
*My Retirement* website is your source for information related to your retirement.  
**Your 1099R is now available online.** To view it, please click the link to the right (ERS, MERS, SPRBT or JRBT), then "View Earnings Statement." Your 1099 is accessible from the "Year End Forms" menu item at the top of your screen. Thank you for visiting *My Retirement*.



**Tools**


**My Pension**


- Update My Personal Information
- View My Pension Profile
- Click Link Below to View Pay Stub
- **ERS**
- Tax Calculator

**My Plans**

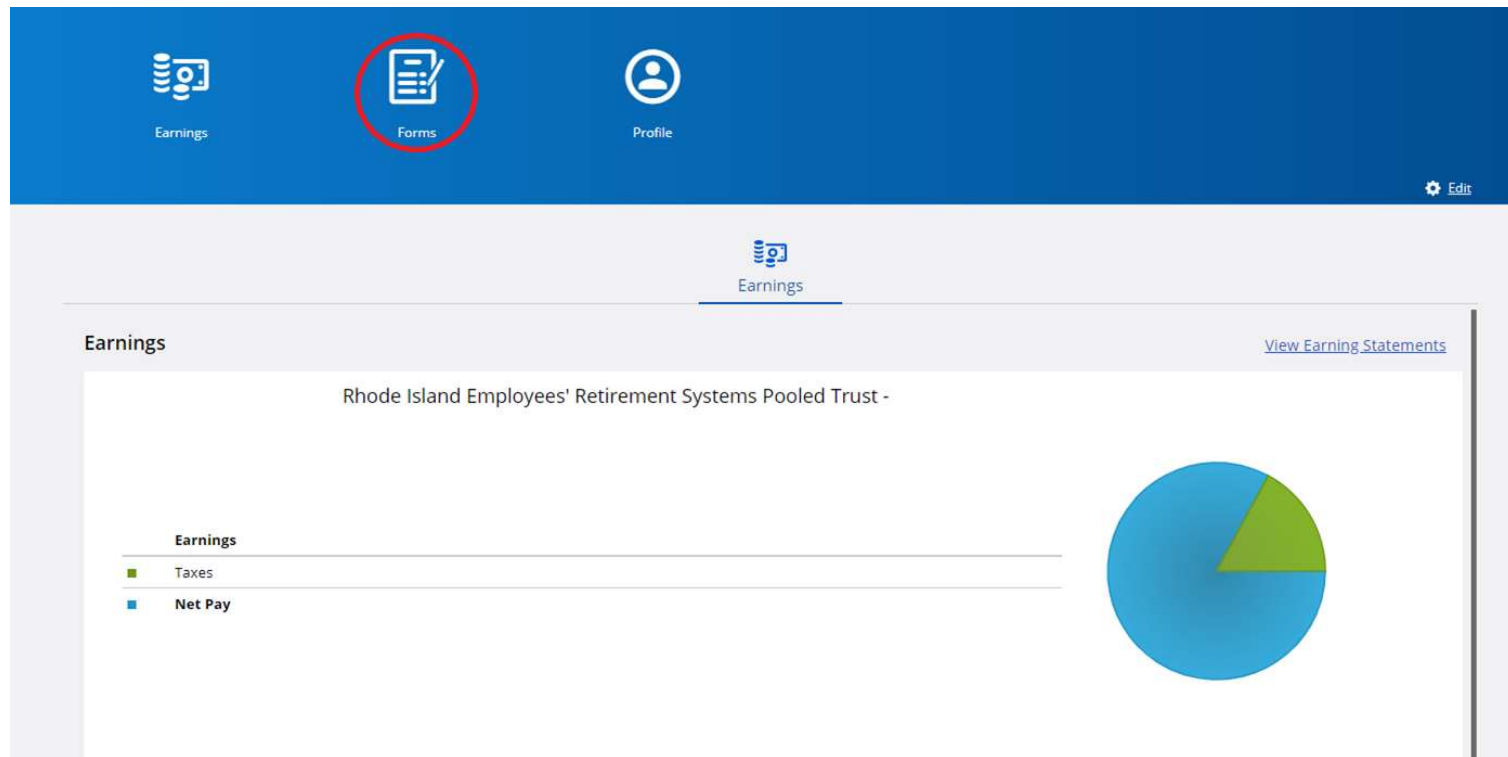
- Forms
- Publications & Reports

**HELP**

 Call Us

 Email Us

You will be redirected to Ceridian  
Click on the Forms button



Select the tax change you would like to make:  
State Tax form for State Tax changes  
W4P Tax form for Federal Tax changes

## Forms

My Form Submissions 

### Available Forms

#### General Forms (2)

 RI Tax Form 2019

 W4P Tax Form 2019

# State Tax Form: Complete the form, save and submit

## Exempt Status #2

If you are the spouse of a servicemember stationed in Rhode Island, your wages may be exempt under the Military Spouses Residency Relief Act. If you meet both of the conditions below, you may claim exemption from Rhode Island withholding for 2022.

- a) You moved to Rhode Island solely to be with your servicemember spouse in compliance with military orders sending the servicemember to Rhode Island **AND**
  - b) You have the same non-Rhode Island domicile as your servicemember spouse.
- If you meet both of the above conditions, write "EXEMPT-MS" on line 3 below.

RI W-4		State of Rhode Island Division of Taxation Employee's Withholding Allowance Certificate	2022
PLEASE PRINT			
Name - first, middle initial, last <input style="width: 100%;" type="text"/>		1. Enter the number of allowances from line 1E above ..... 1. <input style="width: 50px;" type="text"/>	
Present home address (Number and street, including apartment number or rural route) <input style="width: 100%;" type="text"/>		2. Enter any additional dollar amount which you would like withheld from your pay ..... 2. \$ <input style="width: 100px;" type="text"/>	
City, town or post office <input style="width: 150px;" type="text"/>	State <input style="width: 50px;" type="text"/>	3. If you meet the conditions above, write "EXEMPT" or "EXEMPT-MS" whichever applies ..... 3. <input style="width: 100px;" type="text"/>	
Your social security number <input style="width: 150px;" type="text"/>		<small><b>Employee:</b> File this form with your employer to indicate the number of dependents or other personal exemptions to be claimed as allowances for your Rhode Island withholding. You should make a copy for your own records.</small>	
<small><b>Employer:</b> Keep this certificate with your payroll records. The form must be available to the Division of Taxation upon request.</small>			
Under penalties of perjury, I declare that I have examined this certificate, and to the best of my knowledge and belief, it is true, correct and complete.			
Employee Signature <input style="width: 150px;" type="text"/>		Date <input style="width: 100px;" type="text"/>	

## Comment

☐ Add comment to the employee's file.

Done



# Federal Tax Form: Complete the form, save and submit

----- Separate here and give Form W-4P to the payer of your pension or annuity. Keep the worksheet(s) for your records. -----

<b>Form W-4P</b> Department of the Treasury Internal Revenue Service		<b>Withholding Certificate for Pension or Annuity Payments</b> ► For Privacy Act and Paperwork Reduction Act Notice, see page 6.	OMB No. 1545-0074 <b>2021</b>
Your first name and middle initial		Last name	Your social security number
Home address (number and street or rural route)		Claim or identification number (if any) of your pension or annuity contract	
City or town, state, and ZIP code			

**Complete the following applicable lines.**

1 Check here if you **do not want any** federal income tax withheld from your pension or annuity. (Don't complete line 2 or 3.) ☐

2 Total number of allowances and marital status you're claiming for withholding from each **periodic** pension or annuity payment. (You may also designate an additional dollar amount on line 3.) . . . . .  (Enter number of allowances.)

**Marital status:** ☒ Single ☐ Married ☐ Married, but withhold at higher Single rate.

3 Additional amount, if any, you want withheld from each pension or annuity payment. (**Note:** For periodic payments, you can't enter an amount here without entering the number (including zero) of allowances on line 2.) . . . . . \$

Your signature  Date

Cat. No. 10225T Form W-4P (2021)

Form W-4P (2021)

Page 2

Because your tax situation may change from year to year, you may want to refigure your withholding each year. You can change the amount to be withheld by using lines 2 and 3 of Form W-4P.

**Choosing not to have income tax withheld.** You (or in the event of death, your beneficiary or estate) can choose not to have federal income tax withheld from your payments by using line 1 of Form W-4P. For an estate, the election to have no income tax withheld may be made by the executor or personal representative of the decedent. Enter the estate's employer identification number (EIN) in the area reserved for "Your social security number" on Form W-4P.

You may not make this choice for eligible rollover distributions. See *Eligible rollover distribution—20% withholding below*.

**Caution:** There are penalties for not paying enough federal income tax during the year, either through withholding or estimated tax payments. New retirees, especially, should see Pub. 505. It explains your estimated tax requirements and describes penalties in detail. You may be able to avoid quarterly estimated tax payments by having enough tax withheld from your pension or annuity using Form W-4P.

*Periodic payments. Withhold from periodic payments of*

you're single claiming zero withholding allowances even if you checked the box on line 1 to have no federal income tax withheld.

There are some kinds of periodic payments for which you can't use Form W-4P because they're already defined as wages subject to federal income tax withholding. These payments include retirement pay for service in the U.S. Armed Forces and payments from certain nonqualified deferred compensation plans and tax-exempt organizations' deferred compensation plans described in section 457. Your payer should be able to tell you whether Form W-4P applies.

For periodic payments, your Form W-4P stays in effect until you change or revoke it. Your payer must notify you each year of your right to choose not to have federal income tax withheld (if permitted) or to change your choice.

**Nonperiodic payments—10% withholding.** Your payer must withhold at a flat 10% rate from the taxable amount of nonperiodic payments (but see *Eligible rollover distribution—20% withholding below*) **unless** you choose not to have federal income tax withheld. Distributions from an IRA that are payable on demand are treated as nonperiodic payments. You can choose not to have federal income tax withheld from a