FASCore Documentation

FUNCTIONAL PROCESS: Tax Forms
PROCEDURE: Request Duplicate 1099/W2 Tax Forms
DATE: April 2007

Overview

This process outlines the steps necessary to request a duplicate 1099 or W2 tax form. These requests can be made by a participant calling Client Services or by a Plan Sponsor or MetLife Account Executive calling Plan Support.

Procedure:

I. Participant can call Client Services at 800-543-2520 or the Plan Sponsor or Account Executive can call Plan Support at 800-856-7772 and provide the following information to the representative:
   A. Plan name and number
   B. Name and SSN of participant
   C. Tax year
   D. Address
   E. Indicate if the request is to:
      1. Send duplicate 1099 or W2 – participant did not receive
      2. Correct address only
      3. Correct address and send duplicate 1099 or W2
   F. Client Services/Plan Support will open a ticket to the FINTAX team with the above information for items 2 & 3. Changes will be made and the duplicate form will be mailed to the participant within 5 business days.
   G. For duplicate form requests for tax year 2004 to current (no changes), Client Service/Plan Support can view and print the appropriate form and either fax or mail the form to the participant.
   H. Service standard is same day for fax. For regular mail, the form will be mailed within 2-3 business days.
   I. Duplicate form requests for tax years prior to 2004, Client Service/Plan Support will open a ticket to the FINTAX team. The duplicate form will be mailed within 5 business days.