Post Retirement Reporting Page How-To Guide

NYSLRS
New York State and Local Retirement System

This guide shows you (as an employer contact with the Employer Reporting Submitter, Employer Reporting Uploader, Payroll or Personnel security role) how to report retirees using the Post Retirement Reporting Page in *Retirement Online*.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Post Retirement Reporting Page, complete the Report Year and Employer Code fields:

Report Year
• The field pre-populates with 2025.
• If you are reporting for calendar year 2024 or another year:
◦ Enter the year in the Report Year field.
– OR –
◦ Click the magnifying glass icon next to the field and select the year from the dialog box.

Employer Code
• If you are an employer contact for only one location, the Employer Code pre-populates with your employer location code—leave the field as is.
• If you are an employer contact for more than one location:
◦ Enter the employer location code in the Employer Code.
– OR –
◦ Click the magnifying glass icon next to the field and select the employer location code from the dialog box.

Then, click Add.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>

If there is *no* retiree information on file, skip to step 4 to add a new retiree record.

If there is retiree information on file, the **Retiree Details** section appears with the first retiree record displayed.

Retiree records are ordered numerically by Social Security number.

On the right side of the **Retiree Details** bar, **1 of #** provides the number for the displayed record and the total number of retiree records. In this example, record 1 is displayed and there is a total of 43 retiree records.

To view the **next** retiree record, click the **right arrow**.

To view the **previous** retiree record, click the **left arrow**.

To **display all retiree records**, click the **View All** link.

- A maximum of 100 records will be displayed.
- Each record will be separated by a line.

To **display one retiree record at a time**, click the **View 1** link.

To **search** for a retiree record, click the **Find** link.

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</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
Review and update each retiree record. Ensure the information is complete and accurate.
Note: The Retiree SSN field is <u>not</u> editable. If the information is incorrect, see If You Need Help on page 5.
Enter or update the retiree's information (if needed) in the following required fields:

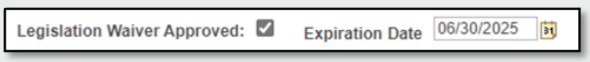
Retiree Name (first and last name)
Retiree Date of Birth (use MM/DD/YYYY format)

Enter or update the earnings amount in one of the following fields:

Earnings as of Above Date

– OR –

Annual Gross Earnings

Note: You <u>cannot</u> delete a retiree record. If there are no earnings to report for 2024, enter $0.01 in the Annual Gross Earnings field.
Select the Legislation Waiver Approved checkbox (if unchecked).
Enter 06/30/2025 in the Expiration Date field or click the calendar icon next to the field to select the date from the dialog box.


Click the Save button.
If you receive an error message, correct the information, then click Save again.
To add a new retiree record, see step 4.
</td></tr>
</table>

Step | **Action**

4

To add a new retiree record, click the **Add Row** button.

The new retiree record becomes the "first" record until it's saved, then the retiree records are reordered numerically by Social Security number. For more information, see step 2.

Enter the **retiree's information** in the following required fields:

- **Retiree SSN**

  Note: *It's important to verify the retiree's SSN is correct. Once you save the retiree record, the* ***Retiree SSN*** *field will become read-only and* *cannot* *be edited. If you save the retiree record with incorrect information, see* ***If You Need Help*** *on page 5.*

- **Retiree Name** (first and last name)
- **Retiree Date of Birth** (use MM/DD/YYYY format)

Enter the **earnings amount** in one of the following fields:

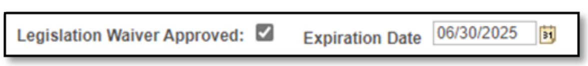
- **Earnings as of Above Date**

– OR –

- **Annual Gross Earnings**

Select the **Legislation Waiver Approved** checkbox (if unchecked).

Enter **06/30/2025** in the **Expiration Date** field or click the calendar icon next to the field to select the date from the dialog box.

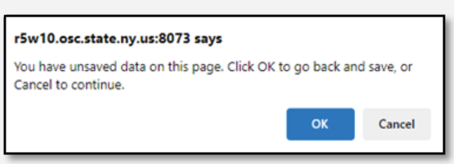


Click the **Save** button.

If you receive an error message, correct the information, then click Save again.

If you do not want to save the new retiree record, click ***any*** link (such as the **Account Homepage** link) to navigate away from the Post Retirement Reporting Page.

A popup box appears with a message stating, "You have unsaved data on this page. Click OK to go back and save, or Cancel to continue."



Click **Cancel** to leave the Post Retirement Reporting Page without saving the retiree record.

To update a retiree record, see step 3.

If You Need Help

If you have questions or need help, use our help desk form.

- From the dropdown menu:
    - Select **Post Retirement Reporting** for assistance with the Post Retirement Reporting Page or to report an issue with a retiree record (such as an incorrect SSN).

    – OR –

    - Select **Retirement Online Troubleshooting** for help accessing *Retirement Online*.
- Complete the required fields.
- In the Additional Comments textbox, explain your question or issue.

  Note: *Do not provide any personal identifiable information, such as the retiree's Social Security number, when submitting issues. Include the following general statement (or something similar), "A retiree's information is incorrect." A member of the Post Retirement Reporting unit will contact you to obtain the corrected information and update the retiree record.*

You can also call 866-805-0990 (press 1 to access the employer menu, then follow the prompts).