Payroll User Group Meeting

February 1, 2018

Presented by

Retirement Redesign Project & State Payroll Services

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Today’s Agenda

- Why are we discussing Retirement today?
- What is changing in Enrollment & Reporting?
- How will these changes impact what I do in PayServ today?
- How do I get access to *Retirement Online*?
- How will we communicate with NYSLRS?
- What’s Next?

Why are we here today?

- NYSLRS is rolling out a brand new Information system for their internal staff, their members, employers, and other stakeholders
- This is a joint NYSLRS & State Payroll presentation/webinar to show how *Retirement Online* is changing the way agencies conduct business with the retirement system through:
  - Automated & manual online member enrollment
  - Access to reported data and contribution rates
  - Loans and service credit payments starts, stops, and changes
  - Establishing employer contacts to support delegated security provisioning
  - Real time notifications and access to documents

WHAT IS CHANGING IN ENROLLMENT & REPORTING?

Member Enrollment Today

Step 1

- State agencies send faxes to Telephone Registration to enroll an employee in NYSLRS and receive a Registration Number for a new member (they can also use phone or mail channels)

Step 2

- State agencies communicate the registration number to State Payroll, by completing the Retirement Plan Panel in PayServ

Step 3

- State Payroll begins reporting on the new members from those agencies using their new registration number

Member Enrollment Today

- Agencies need to call, send or fax a paper form to initiate registration
- Delays in entering registration number and contribution rate in PaySERV
- NYSLRS does not receive data for a person until they have a registration number in PayServ
- Agencies submit a paper adjustment form to NYSLRS for earnings and days

Member Enrollment in Retirement Online

Step 1
- State agencies complete job transactions in PayServ per usual

Step 2
- State payroll reports all new hires and transfers in Company NYS who are not enrolled in a different retirement system

Step 3
- NYSLRS automatically enrolls all new mandatory members

Step 4
- NYSLRS sends registration information for new, mandatory employees to State Payroll

Step 5
- State Payroll updates the Retirement Plan Panel in PayServ with the information provided from NYSLRS

Member Enrollment in Retirement Online

- PayServ will provide data for a broader group of employees
- NYSLRS evaluates if a person is ‘Mandatory’ and processes enrollment automatically
- Enrollment information returned to PayServ
- Agencies can enroll a member through Retirement Online (e.g. Optional Members)
- View Registration Number, Tier, and Contribution Rate
- Those members that have previously retired from another NYS Public retirement system (noted by the retirement indicator) will not be automatically enrolled in NYSLRS

Member Enrollment (Continued)

- Users can also select the ‘Enroll a Member’ link from *Retirement Online* for **optional members**
- This brings them to an ‘Enroll a Member’ page where they can enter employer information and employee details
- After submission, registration information is generated
- Additionally, ability to upload an optional member form (or submit paper form)

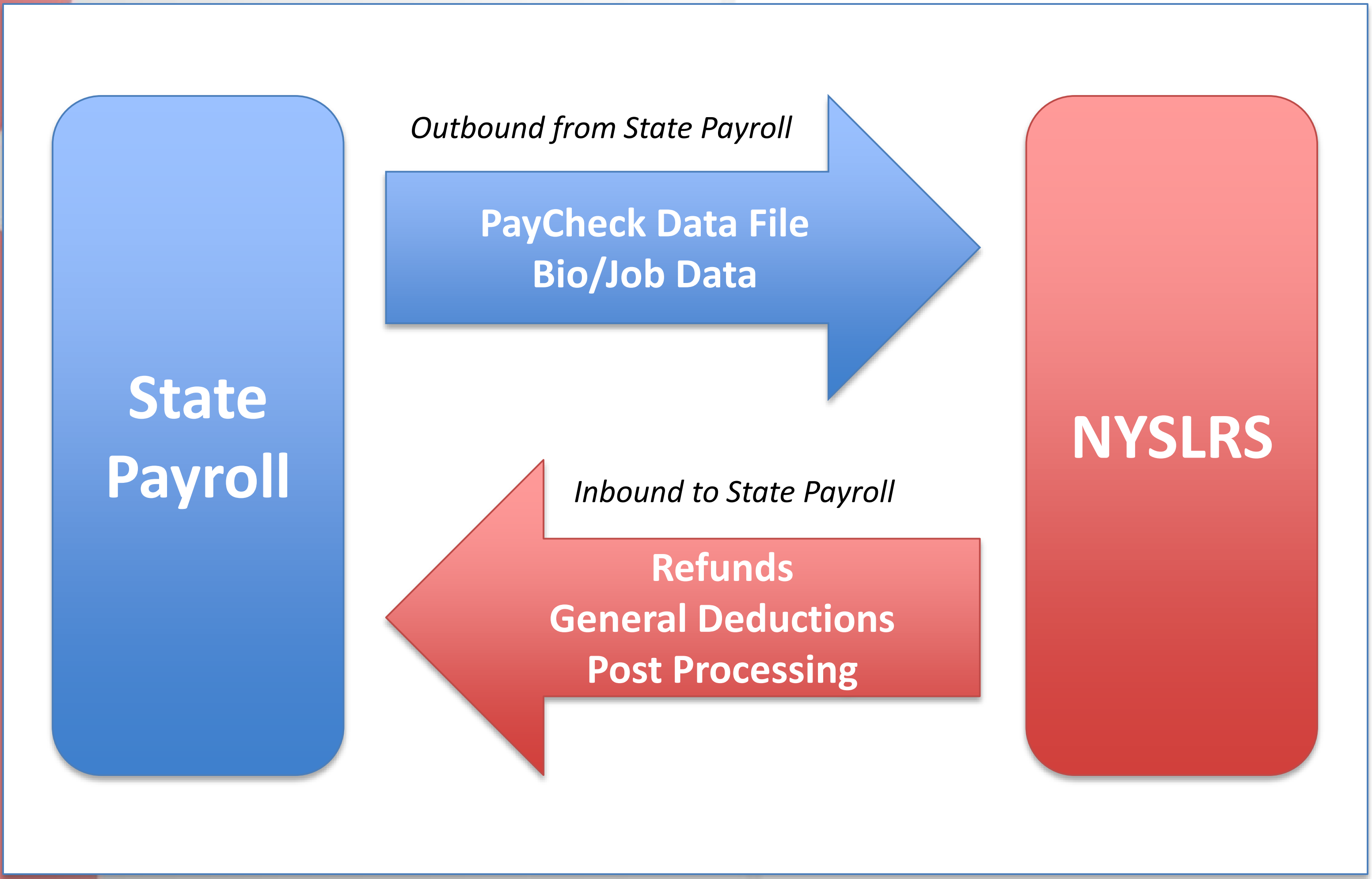
VDC Enrollment

- If Voluntary Defined Contributions (VDC) indicator for an employee is set to “Yes” through reporting:
  - The employee will not be automatically enrolled; NYSLRS will need to review
  - NYSLRS enrollment staff will either reach out to agencies (or check PayServ) to determine if the employee has opted for VDC or needs to be enrolled
- NYSLRS will have a report that details the number of people that fall into this category
- If the employee does not join VDC within 30 days of being hired, NYSLRS enrollment staff will enroll the employee in NYSLRS

Access to Retirement Reported Data Today

- Cannot view data reported in *Retirement Online*, but the data is viewable in PayServ
- Need to contact NYSLRS directly for:
  - Questions on employee deductions
  - Information on historical reporting data
  - To determine if an adjustment form needs to be submitted

State Payroll Reporting for Retirement Online



Benefits of Reporting in Retirement Online

- Benefits of Collecting Additional Data:
  - Streamlines the interfaces between Payroll and Retirement, reducing workload on agencies to maintain routine deduction information
  - Automates enrollment of mandatory members
  - Reduces time that employers need to spend providing historical information to NYSLRS
  - Detailed information to support benefit calculations
  - Collection of data to calculate Service Credit Purchase costs for optional members

Loans & Service Credit Payments Today

Step 1
- Member chooses to take a loan and/or to purchase service

Step 2
- NYSLRS notifies the agency of any starts, stops, or changes by mail

Step 3
- Agencies enter loan and service credit purchase deductions into PayServ

Starts, Stops, Changes Pain Points: Timing issues, improper deductions, and refunds. As well, balances can become out of date.

Loans & Service Credit Payments in Retirement Online

Step 1
- Member chooses to take a loan and/or to purchase service

Step 2
- NYSLRS to provide the Deductions file to State Payroll with start, stop, and change Information

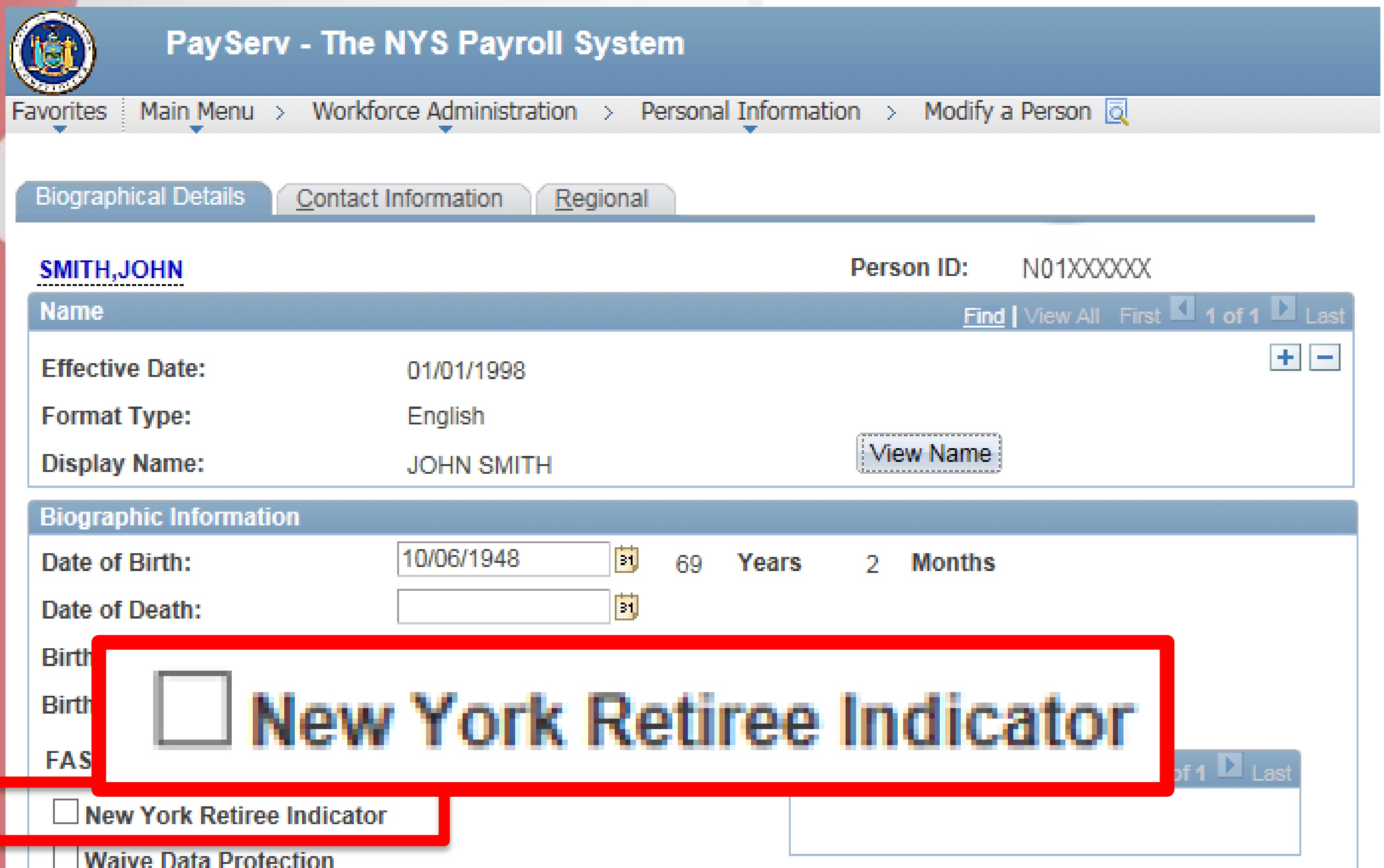
Step 3
- Agencies and members will be notified either through portal notifications or paper mail

Step 4
- NYSLRS validates the PayCheck Data file to identify improper withholdings immediately, including contributions

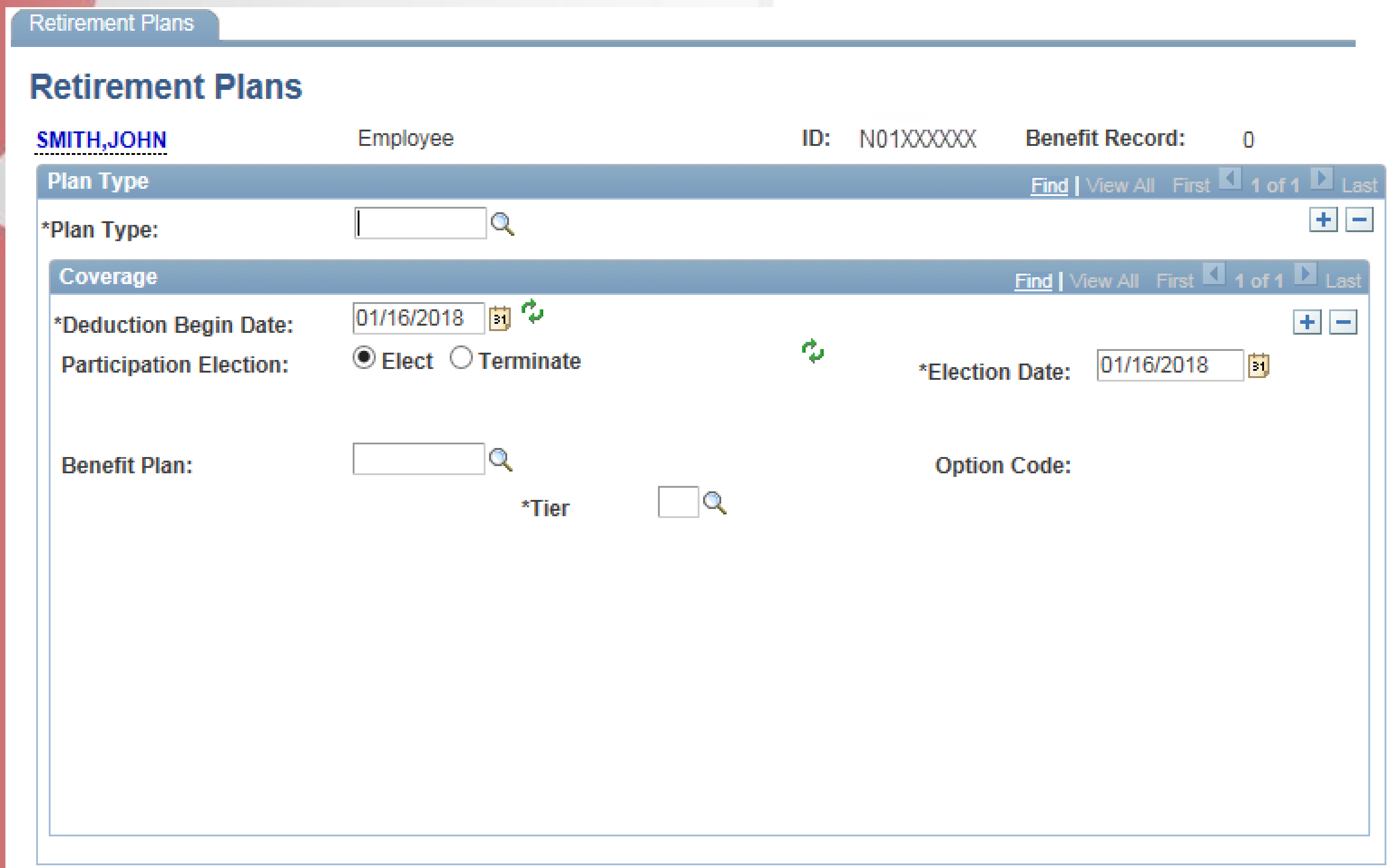
Impacts: Agencies will no longer need to enter or update information in PayServ

HOW WILL THESE CHANGES IMPACT WHAT I DO IN PAYSERV TODAY?

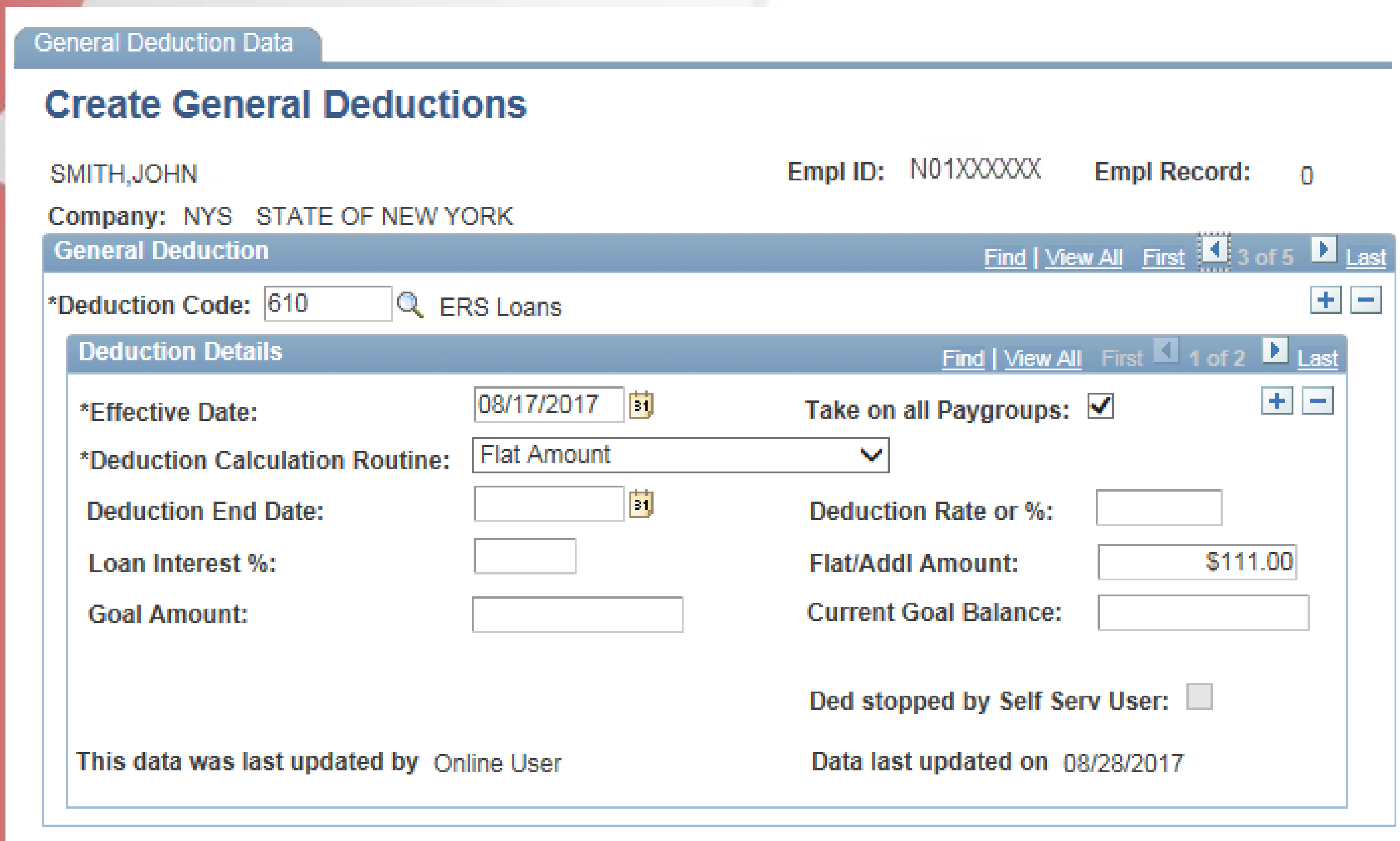
Inputs State Payroll Needs from Employers



Inputs State Payroll Needs from Employers



Inputs No Longer Needed from Employers



HOW DO I GET ACCESS TO *RETIREMENT ONLINE*?

Agency Level Contact Maintenance and Security

Summary

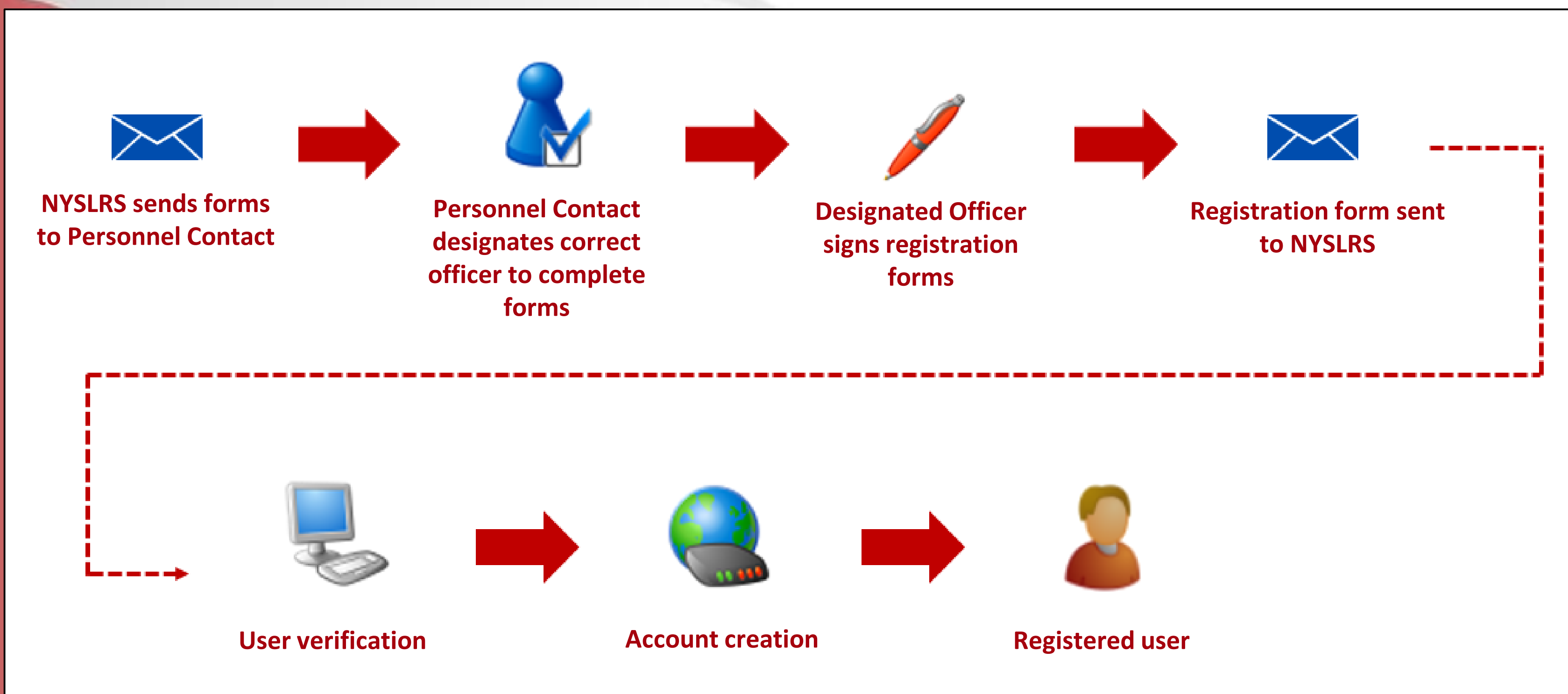
- Security & Contact Admins must be identified at each agency that does not currently use the BSC
- A Contact Admin must be identified for agencies that currently use the BSC
- Upon authorization from the Agency, BSC will have Security & Contact Admins for each Agency they serve

Benefits

- Security Admin manages all of the access rights for each agency
- Contact admin manages all of the individuals that may need to receive communications for each agency

Designating Contact & Security Administrators

For all state agencies, authorization forms were mailed to the personnel contact at your organization who designated the correct officers to appoint Contact and Security Administrators.



Contact & Security Administrator Roles

Employer Contact Administrators	Employer Security Administrators
• Maintains employer contact information for individuals with whom NYSLRS communicates about topics including payroll, personnel, security, etc. • Completes periodic reviews and updates to employer contacts. This includes adding new contacts, removing old contacts, and modifying the demographic information of existing contacts. • Agencies using BSC will have one contact admin – BSC will have two contact admins	• Requests *Retirement Online* system access for their location code for users who need it to do business with NYSLRS. • Monitors for fraud or suspicious activity. • Reports unusual activity to NYSLRS for follow up. • Remove access when necessary. • BSC will act as security admins for their clients.

New Process

Employer Contact Administrator

- A Contact Administrator at each employer will maintain employer contact information via Retirement Online.
- If the employer contact is not a NYSLRS member, additional approval may be needed from NYSLRS before the contact can be set up.
- *Note: When changing Contact and Security Admins, a new authorization form must be submitted to NYSLRS signed by the organizations’ CEO, CFO, or authorized requestor.

Employer Security Administrator

- New employer contacts must be added by Employer Contact Administrators before Employer Security Administrators request their security access.
- Access is requested by the Employer Security Administrator and approved by NYSLRS.

Retirement Online Employer Security Roles

Security Role	Description
Security Administrator	Requests *Retirement Online* system access for their location code for users who need it to do business with NYSLRS. Monitors for fraud or suspicious activity. Reports unusual activity to NYSLRS for follow up. Remove access when necessary.
Contact Administrator	Maintains employer contact information for the organization. Completes periodic reviews and updates to employer contacts. This includes adding new contacts, removing old contacts, and modifying the demographic information of existing contacts.
Payroll	Accesses and views a listing of all contribution rates and effective date of any rate changes for employees at their location code. Also receives requests to maintain payroll deductions owed to NYSLRS.
Personnel	Completes member enrollment transactions for new employees at their location code.

**Please see supplemental security roles worksheet for more information on these roles and the notifications that are applicable.*

Retirement Online Employer Security Roles

Security Role	Description
Billing	The functionality for this role is covered by Payroll Services. *This role is also not applicable until 2019.*
Board Clerk	The functionality for this role is covered by Payroll Services.
Employer Reporting Approver	The functionality for this role is covered by Payroll Services.
Employer Reporting Submitter	The functionality for this role is covered by Payroll Services.

These roles are not applicable to state agencies; however, they will appear as options.

Setting Up Employer Security Roles

- As of December 2017, employers are now able to log in to *Retirement Online* and set up their employer contacts using the designated security roles
- This is an activity to be completed by the agency's Security Administrator
- This is crucial in providing the correct access to individuals at your agency
- Once logged in, additional electronic 'Help' tools are available within the portal
- You can also contact the *Retirement Online* Help Desk by email at RetirementHelpDesk@osc.state.ny.us or by phone at (844) 619-9614

HOW WILL AGENCIES COMMUNICATE WITH NYSLRS?

Communications with Employers Today

- NYSLRS' primary communication channel is mail
- Lag for employers to receive information and requests
- Can lead to delays in processing requests and impact quality of service to members

Communications in Retirement Online

- Notifications generated and available through *Retirement Online*
- Notifications are generated to:
  - Provide information
  - Request information or actions
- Correspondence can be viewed electronically or received by mail

WHAT’S NEXT?

NYSLRS Cutover/System Outage

- **Time period: April 20, 2018 – May 15, 2018**
- ‘Cutover’ is the period of time in which NYSLRS will be converting all of their existing data into the new *Retirement Online* system
- Until the end of this Cutover period, employer reporting and member enrollments will not be initiated
- **Major Milestone Dates:**
  - **Feb. 21, 2018: Last Day for REAP Notifications**
  - **Feb. 28, 2018: Last Day for Telephone Registrations**
  - **~April 20, 2018: Final Start/Stop/Change Mailing**
  - **Mid-May 2018: Retirement Online launches for Employers**

Additional Training

- All state agencies will be part of the same **transition group**
- A transition group allows employers the ability to more easily transition to the new *Retirement Online* system – for state agencies, this is specific to the process of member enrollment for optional members
- Member enrollment virtual training sessions to be held for state agencies
- Transition Coaches will be available to assist employers through the transition process during these virtual trainings as well as any time via the *Retirement Online* Helpdesk

Questions & Inquiries

- **Please submit access forms ASAP**
- **For any questions regarding the blue/green employer access forms (or if you need a new one),**
  - Please contact the Employer Access team at **NYSLRS_Employer_Access@osc.state.ny.us**
- **For general Employer Retirement Online issues, support, or questions,**
  - Please contact the Retirement Online Employer Help Desk at **RetirementHelpDesk@osc.state.ny.us**
  - Or by phone at (844) 619-9614

ANY QUESTIONS?