

Retirement Online Update

Payroll Users Group (December 6, 2018)



Office of the New York State Comptroller
Thomas P. DiNapoli

 **NYSLRS**
New York State & Local Retirement System
Colleen C. Gardner, Executive Deputy Comptroller

Discussion Topics

- Retirement Online Timeline
- State Agency Certification Status
- What can I do Now? Submitting the RS6221 – Statement of payments and accrued leave credits
- What am I getting ready for? Enrolling Members using Retirement Online
- Questions

Release 2 Timeline

Now – January 14th

February 1 – Mid-May

Mid May

Certification & Training

Refresh, Retrain, and Practice

Go-Live

- Get Bronze & Silver Certified to make sure your agency is prepared to use Retirement Online
- **BONUS:** Use Retirement Online production to submit RS6221 - Statement of Accrued Payments and Leave and Credits
- Re-take Enrollment/Notification Training
- Attend a webinar or training support session
- Sign into the Retirement Online Training environment and practice enrolling members
- Sign into the Production Retirement Online environment
- Enroll optional members using the “Enroll a Member” function
- View detailed information on your employees



Retirement Online Updates: Certification

Key Dates:

- Bronze Certification Due: September 30, 2018
- Silver Certification Due: January 14, 2019
- Targeted System Upgrade & Retirement Online Release 2: May 2019

Check off the steps you've completed so far in the certification process

 **Bronze Level**

In this stage, employer contacts will receive their login credentials for *Retirement Online*. This will prepare you for training activities and enrollment.

- Establish your Security Administrators and Contact Administrators (submit the blue/green forms)
- Request access for Employer Contacts and assign security roles



Silver Level

In this stage, State agencies will need to practice enrolling new members.

- Complete training on enrolling new members in *Retirement Online*
- Complete training on notifications and corresponding *Retirement Online* actions

Total State Employers	388	Total State Employers	388
State Employer NOT Bronze Certified	60/335 (18%)	State Employers NOT Silver Certified	73/335 (22%)
BSC Employers NOT Bronze Certified	0/53 (0%)	BSC Employers NOT Silver Certified	0/53 (0%)
Total State Employers NOT Bronze Certified	60/388 (16%)	Total State Employers NOT Silver Certified	73/388 (19%)

What's Your Certification Status?

You can learn more about **Retirement Online** and determine your certification status at: www.osc.state.ny.us/retire - you can also check with us today!

The screenshot shows the Retirement Online website interface. At the top, the title "Retirement Online" is displayed. Below it is a navigation bar with links for Home, About, Local Employers, State Employers (highlighted with a red box), Contact Us, and For Business Partners. The main content area is divided into several sections:

- Learn More and Get Ready for Retirement Online**
 - Get Certified**

Retirement Online will improve service to NYSLRS members and save you time and effort. The first step to using these powerful new tools is completing employer certification.
 - Silver and Gold Certification**

Complete your Silver Certification now. See our resources below — and watch our video. Start preparing for Gold Certification by getting familiar with enhanced reporting.
- WHAT'S NEW**
 - Gold Certification: Benefits of Using Enhanced Reporting
 - Gold Certification: Enhanced Reporting File Format Guide
 - Gold Certification: Enhanced Reporting for File Creators Guide
- SILVER CERTIFICATION TOOLKIT:**
 - Silver Certification Quick Guide
 - Silver Certified Employers (highlighted with a red box)
 - How to Prepare a Legacy Reporting Test File (Local Employers)
 - Certification Requirements for Local Employers
 - Certification Requirements for State Employers
- SELF-PACED TRAINING:**
 - Legacy Employer Reporting Fundamentals (Local Employers)
 - Member Enrollment Fundamentals — Local Employers
 - Member Enrollment Fundamentals — State Employers
 - Employer Notifications Fundamentals (highlighted with a red box)
- QUICK LINKS:**
 - Bronze Certification Quick Guide
 - Bronze Certified Employers
 - Get Ready Guide (Local Employers)
 - Security Roles for Local Employers
 - Security Roles for State Employers

If You Need Forms or Help with Bronze/Silver Certification

- **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.ny.gov
 - You can also stop in at our table today
- **For help with signing in, establishing security roles, or other inquiries:**
 - Please contact the Retirement Online Employer Help Desk at RetirementHelpDesk@osc.ny.gov
 - Or by phone at (844) 619-9614



WHAT CAN I DO NOW?

**SUBMITTING THE RS6221
– STATEMENT OF
PAYMENTS AND
ACCRUED LEAVE CREDITS**

Submitting the RS6221 in Retirement Online

1. The individual with the Personnel security role will receive an communication telling them that an RS6221 needs to be submitted. After downloading and completing the form, they will sign in to Retirement Online
2. On the account homepage, click “Upload a Member Document”

Retirement Online
NYSLRS

Thomas P. DiNapoli
State Comptroller

NYSLRS Website * Account Homepage Help Contact Us

Welcome, George! You are signed in as George [Logout](#) [Sign out.](#)

My Profile Information

Name: George Kemp

Account Email: [\[redacted\]](#) [Update](#)

Remember to periodically review and update your Account Email, as it will be used to provide important notifications regarding changes or updates to your Retirement Online Employer account.

Please click the 'Manage Contact List' link and select an Employer to view your business-related mailing address, email address and telephone information.

I want to...

- [Manage Contact List](#)
- [Manage Security Access](#)
- [Make a Request](#)
- [View My Events](#)
- [Change My Password](#)
- [Manage My Security Profile](#)
- [See NYSLRS News](#)
- [Upload a Member Document](#)

Submitting the RS6221 in Retirement Online

1. Browse your computer for the completed RS6221 document (must be a PDF)
2. Enter the member details
3. Select the Document Type
4. Click Submit!

The screenshot displays the 'Retirement Online' interface for NYSLRS. At the top, the logo 'Retirement Online NYSLRS' is visible, along with the name 'Thomas P. DiNapoli, State Comptroller'. A navigation bar includes 'NYSLRS Website', 'Help', and 'Contact Us'. The main content area features a 'Document Upload' section with a red-bordered 'Add Attachment' button. Below this is a red-bordered form for member details, containing a 'Select Employee' dropdown menu (currently showing 'NYSLRS ID'), a 'NYSLRS ID' text input field, and an 'Employee' text input field. A second red-bordered dropdown menu is labeled 'Member Document Type'. A red-bordered 'Submit' button is located at the bottom right of the form area. The footer contains the copyright notice '© New York State Office of the State Comptroller'.

A stylized silhouette of a human figure is positioned on the left side of the slide. The silhouette is filled with a solid red color and has a white outline. The figure is facing right. The background is white, and the silhouette is partially overlaid by the text.

**WHAT AM I GETTING
READY FOR?**

**ENROLLING MEMBERS
USING RETIREMENT
ONLINE**

Enrolling Members using Retirement Online

- You will be able to enroll members in NYSLRS using Retirement Online
- Starting in February, your Personnel Security holder will be able to practice this process using the Retirement Online training environment
- Starting after Go-Live, your Personnel Security holder will be able to enroll members using Retirement Online
 - **Mandatory members will be enrolled automatically through the State Payroll file when you 'hire' them in PayServ**
 - Optional members should be enrolled using Retirement Online

Access Enrollment Dashboard

Welcome, **Kelly!**

Notifications

You have no Notifications at this time

I want to...

- Make a Request
- Change My Password
- Manage My Security Profile
- View My Scheduled Events
- Find Documents
- See NYSLRS News
- Manage Contact List
- Manage Security Access
- Submit Resolution For Official
- Request Plan Upgrade
- Update My Account Email
- Submit Disability Application

[Access Reporting Dashboard](#)

[Access Billing Dashboard](#)

[Access Enrollment Dashboard](#)

[Access Employee Report History](#)

My Cases

Case ID Number	Type	Status	Date Opened	Applicant	Member
40870985	Change Password	Open	11/01/2018		

NYSLRS News

Retirement Online Training and Resources for Employers

Tools and information to help you make the transition to *Retirement Online*.

[Read more..](#)

Enter Employer Details

- 1 Employer Details
- 2 Personal Information
- 3 Job Information
- 4 Review Membership
- 5 Enrollment Results

Enter Employer Details

Employer Details

*Location Code	<input type="text" value="00300"/>	DEPARTMENT OF LAW
*Retirement System	<input type="text" value="ERS"/>	
Agency Code	<input type="text" value="03000"/>	

Cancel

Next

Enter New Member Details



Employer
Details

2

Personal
Information

3

Job
Information

4

Review
Membership

5

Enrollment
Results

Enter Personal Information

If this employee is already enrolled into another retirement program for their position, such as ORP, VDC, or TRS, do not continue with this process. NYSLRS cannot accept any reporting information that is already associated with another retirement program. Click Cancel to return to your account homepage.

If this employee is a retiree from another NYS or NYC public retirement system, do not continue with this process. We will only accept this application by fax. Click Cancel and return to your account homepage.

Personal Information

*Name Prefix

Middle Name

Name Suffix

*Date of Birth

*SSN

*Address Line 1

Address Line 3

*State New York

County

*First Name

*Last Name

*Gender

Address Line 2

*City

*Postal Code

Cancel

Return

Next

Enter Job Information



Employer
Details



Personal
Information

3

Job
Information

4

Review
Membership

5

Enrollment
Results

Enter Job Information

Job Information

*Hire Date

Full Time Permanent Appointment Date

Location Code

Business Unit

*Job Code

*Regular/Temporary

*Full/Part Time

*Employee Classification

*Standard Work Period

*Standard Hours

*Payroll Frequency

*Projected Annualized Wage

Cancel

Return

Next

Review and Submit New Member

Retirement Online
NYSLRS



Employer
Details



Personal
Information



Job
Information

4

Review
Membership

5

Enrollment
Results

Review Membership Details

Personal Information

Name Prefix	Mrs	First Name	Mary
Middle Name		Last Name	Johnson
Name Suffix		Gender	Female
Date of Birth	01/01/1980		
SSN	012-34-5678		
Address Line 1	110 STATE ST	Address Line 2	
Address Line 3		City	ALBANY
State	NY New York	Postal Code	12207-2027
County			

Job Information

Hire Date	10/11/2018		
Location Code	00300 DEPARTMENT OF LAW	Business Unit	ERS
Job Code	03600E General Employee	Full/Part Time	Full-Time
Regular/Temporary	Regular	Standard Hours	7.50
Employee Classification	10 Month		
Standard Work Period	Daily		
Payroll Frequency	Biweekly		
Projected Annualized Wage	39000.00		

Cancel

Edit

Submit

View Enrollment Confirmation

Retirement Online
NYSLRS



Employer
Details



Personal
Information



Job
Information



Review
Membership

5

Enrollment
Results

Enrollment Results

Enrollment Confirmation

You have successfully submitted this employee's information. His or her NYSLRS Membership information is :

NYSLRS ID: R12782656

Empl Record: 0

Member Registration Number: 62134267

Contribution Rate is: 3.00

Tier: 6

Close

Enroll Another Employee

Upload Form for Optional Members



Employer
Details



Personal
Information



Job
Information



Review
Membership

5

Enrollment
Results

Enrollment Results

Optional Membership

The member has been identified as Optional.

To Enroll them as a member of NYSLRS, click the "Enroll - Upload Form" button. If you choose to enroll them, you must submit a signed Membership Form in order to confirm their enrollment into NYSLRS.

To establish this employee as optional for reporting purpose only, click the "Hire Optional" button. No membership will be established and no form is required.

Return

Hire Optional

Enroll - Upload Form

Upload Form for Optional Members



Employer
Details



Personal
Information



Job
Information



Review
Membership



Enrollment
Results

Enrollment Results

Upload Membership Form

Please upload the required document below.

The document to be uploaded should be of Maximum 1MB PDF file.

Document Type : MEMBERSHIP FORM

Mary_Johnson.pdf

Browse.....

Return

Next >>

Ask Me Anything – Member Enrollment

We are holding Question & Answer webinars for employers. On 11/27 we held a State Member Enrollment session. Missed it? View the recording:

Subscribe Site Map Contact Us Google Translate™

EVENT ARCHIVE

Ask Me Anything Webinar: Member Enrollment for State Employers — November 28, 2018

During this session, we answered questions from NYSLRS employers about member enrollment in Retirement Online.

Webinar
VIDEO

State Agency Information Session: June 1, 2017

The State Agency Information Session explained how Retirement Online will impact the way State employers do business with NYSLRS, including streamlined member enrollment, automated loans and arrears starts, stops and change notices, and increased access to member data and reports.

Materials from the session:

Presentation
SLIDES

Meeting
HANDOUT

Meeting
VIDEO

[↑ Return to Top](#)



ANY QUESTIONS?

Don't Forget!

- **Bronze Certification Target: September 30, 2018**
- **Silver Certification Target: January 14, 2019**
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