## **Retirement Online Update**

Payroll Users Group (December 6, 2018)





#### **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
- 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**

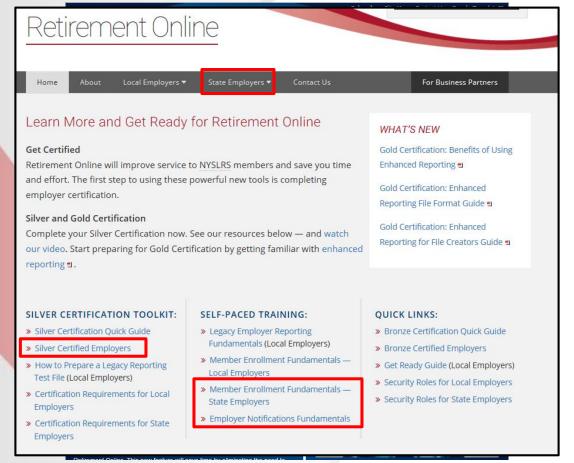
#### Key Dates:

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



#### What's Your Certification Status?

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



## 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 <u>NYSLRS\_Employer\_Access@osc.ny.gov</u>
  - 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 <u>RetirementHelpDesk@osc.ny.gov</u>
  - Or by phone at (844) 619-9614

## WHAT CAN I DO NOW?

SUBMITTING THE RS6221

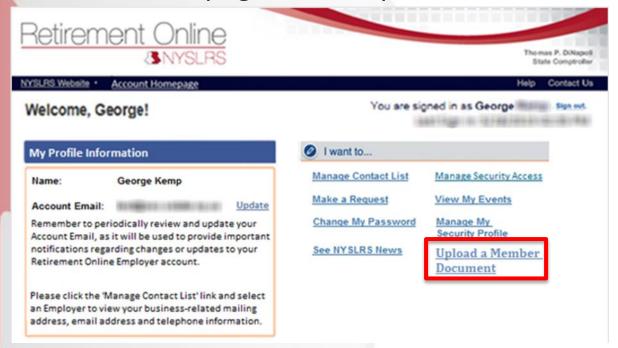
- STATEMENT OF

PAYMENTS AND

ACCRUED LEAVE CREDITS

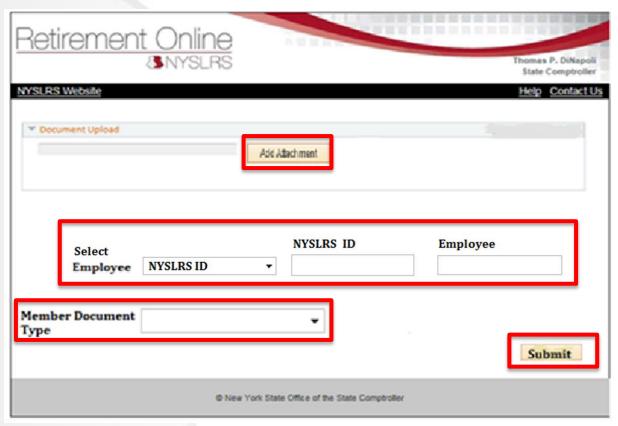
#### **Submitting the RS6221 in Retirement Online**

- 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
- On the account homepage, click "Upload a Member Document"



#### **Submitting the RS6221 in Retirement Online**

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



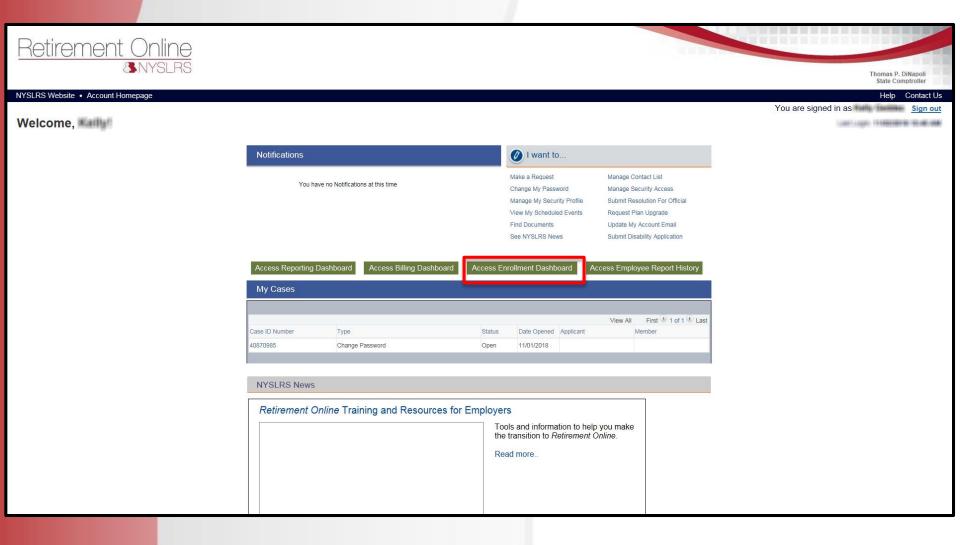
# WHAT AM I GETTING READY FOR?

ENROLLING MEMBERS
USING RETIREMENT
ONLINE

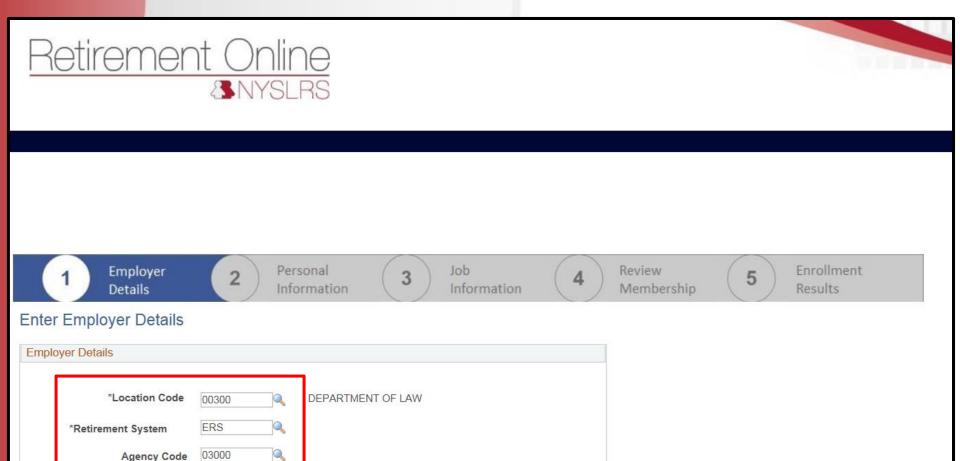
#### **Enrolling Members using Retirement Online**

- 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**



### **Enter Employer Details**



Next

Cancel

#### **Enter New Member Details**



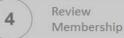
**NYSLRS Website** 

Account Homepage









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Enrollment Results

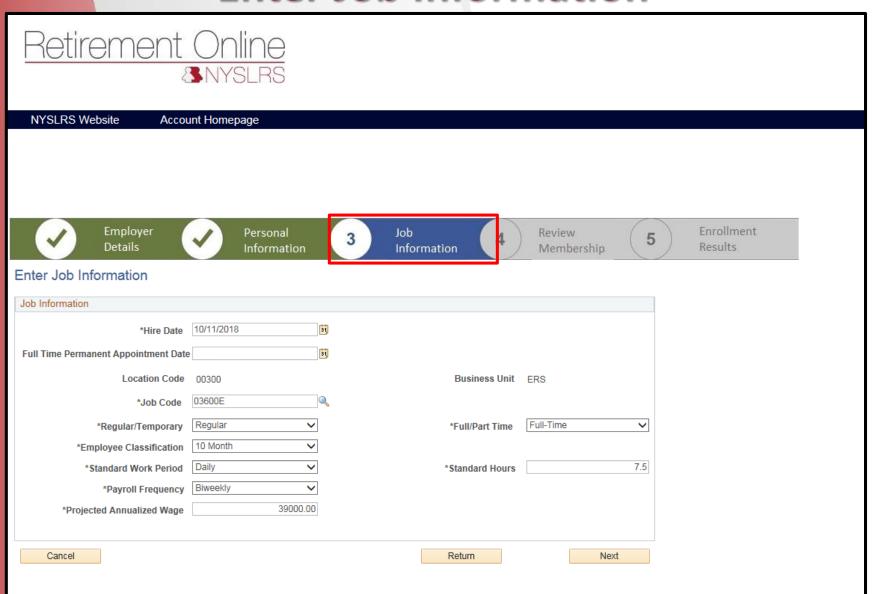
#### **Enter Personal Information**

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.

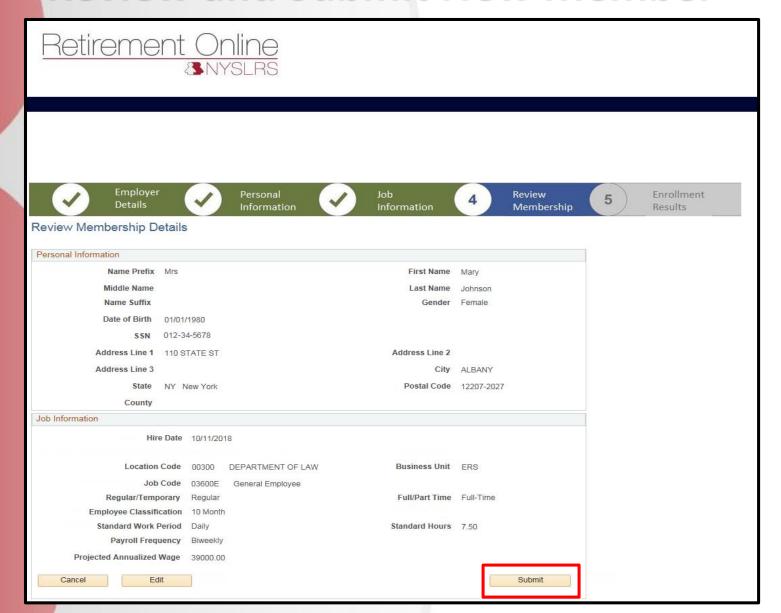
If this employee is a retiree from another NYS or NYC public retirement system, do not continue with this process. We will only accept this application by fax. Click Cancel and return to your account homepage.

#### Personal Information Mary \*Name Prefix $\checkmark$ \*First Name Middle Name \*Last Name Johnson Name Suffix 01/01/1980 Female \*Date of Birth \*Gender 012-34-5678 110 State St \*Address Line 1 Address Line 2 Albany Address Line 3 NY 12207 \*State New York \*Postal Code County Cancel Return Next

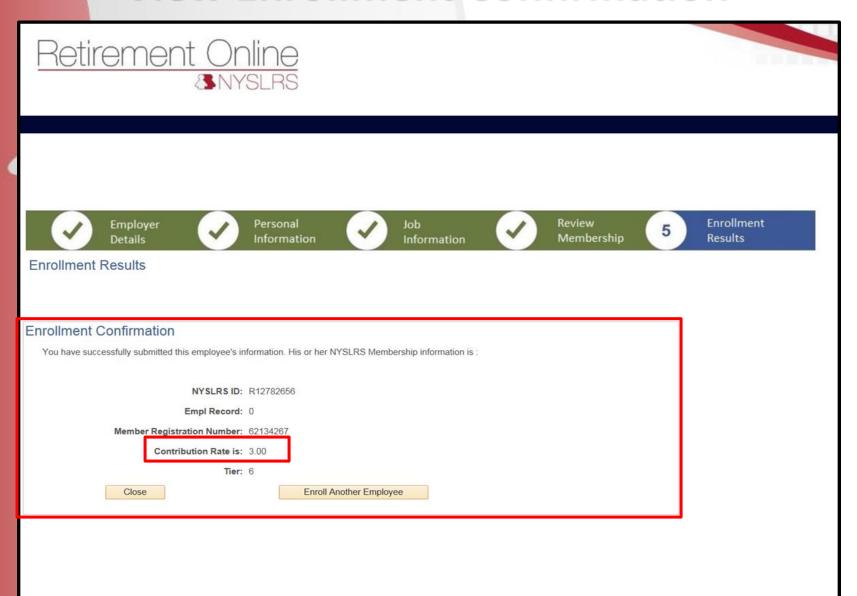
#### **Enter Job Information**



#### **Review and Submit New Member**



#### **View Enrollment Confirmation**



#### **Upload Form for Optional Members**



**NYSLRS** Website

Account Homepage



Employer Details



Personal Information



Job Information



Review Membership



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**







Personal Information



Job Information



Review Membership



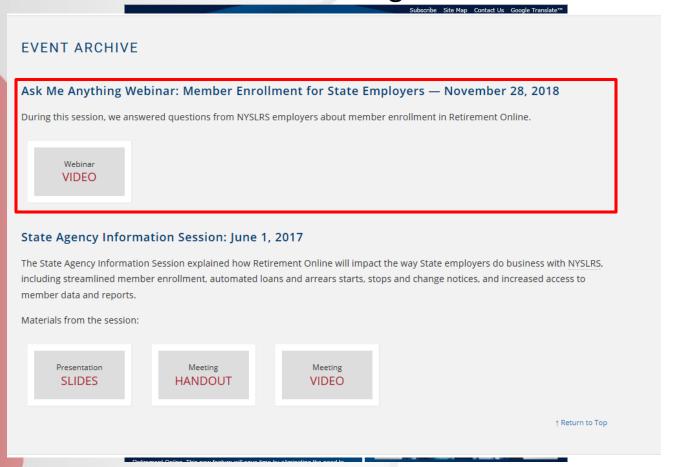
Enrollment Results

**Enrollment Results** 

Upload Membership For	m			
Please upload the required document below.  The document to be uploaded should be of Maximum 1MB PDF file.				
Document Type : MEME	ERSHIP 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:



## **ANY QUESTIONS?**

#### **Don't Forget!**

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- Silver Certification Target: January 14, 2019
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