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## A Message from Comptroller Thomas P. DiNapoli

It's been a year since we introduced member enrollment and monthly reporting to *Retirement Online*. I am grateful that NYSLRS employers readily adopted this more efficient way of doing business with the Retirement System, especially because it has helped us continue doing our work as we faced the COVID-19 crisis together.



During this difficult time, many employers have used *Retirement Online* from remote locations to do their enrollment and reporting work. The system has also let our Retirement System staff continue to serve members and employers, even while away from the office.

We have worked in partnership with our employers to transition to this new way of doing business, and I hope you will continue to let us know how we can make *Retirement Online* for employers even better.

This year, we continue improving our service to employers with the introduction of enhanced reporting in *Retirement Online*. Enhanced reporting will automate member enrollments, improve the accuracy of employee service credit information, and reduce the number of requests you get from NYSLRS. Collecting more complete data will help us provide better service to your employees, the NYSLRS members we are here to serve.

NYSLRS employers are at the heart of our mission to provide accurate information and benefits to our members and retirees. If you have any questions, please do not hesitate to contact us. My staff and I look forward to working with you as we expand our online services.

Sincerely,

Thomas P. DiNapoli  
State Comptroller

## Make the Switch to Enhanced Reporting

Now that you can enroll and report members in *Retirement Online*, it's time to take advantage of the benefits enhanced reporting has to offer. The enhanced report lets you enroll, report and make adjustments in one single file, streamlining your work and saving you time.

If you have 15 or fewer employees, you can use *Retirement Online* enhanced manual reporting. To learn more, review the Introduction to Enhanced Manual Reporting at [www.bit.ly/intro-enhanced-manual-reporting](http://www.bit.ly/intro-enhanced-manual-reporting) and then fill out the Get Started Form at [www.surveymonkey.com/r/BJPMK3R](http://www.surveymonkey.com/r/BJPMK3R).

If you have more than 15 employees at your location, watch the Gold Certification Process video at [youtu.be/0SZxoqYKg8Y](http://youtu.be/0SZxoqYKg8Y) and fill out the Employer Reporting Use Survey at [www.surveymonkey.com/r/FHWV9QF](http://www.surveymonkey.com/r/FHWV9QF).

A NYSLRS team member will contact you and help plan your transition to enhanced reporting.

Ready to get started? Make the switch to enhanced reporting today!



## Update Your Retirement Online Contacts

Contact Administrators and Security Administrators should sign in to *Retirement Online* and review your employer contacts and the security roles assigned to them. Keeping this information current will help make sure your staff have proper access to *Retirement Online* and that they receive messages about your account. For more information, visit the Security and Contact Administrators page ([web.osc.state.ny.us/retire/retirement\\_online/admin-roles.php](http://web.osc.state.ny.us/retire/retirement_online/admin-roles.php)), which lists the different contact types and security roles.

*Special note for local employers only:* If you haven't already done so, be sure to assign someone in your organization to the billing security role. This will be important in 2020 as we expand employer billing in *Retirement Online*.

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## Web Resources to Help You

We continuously make improvements to *Retirement Online* to better serve you. Read about the latest updates we've made on our System Updates page at [web.osc.state.ny.us/retire/retirement\\_online/system-updates.php](http://web.osc.state.ny.us/retire/retirement_online/system-updates.php).

Have questions about using *Retirement Online*? We collect the answers to common employer questions on our Tips & Tricks page at [web.osc.state.ny.us/retire/retirement\\_online/tips-tricks.php](http://web.osc.state.ny.us/retire/retirement_online/tips-tricks.php).

Looking to refresh your legacy enrollment or reporting skills in *Retirement Online*? You can retake our self-paced training any time by visiting [web.osc.state.ny.us/retire/retirement\\_online/resources.php#training](http://web.osc.state.ny.us/retire/retirement_online/resources.php#training).



## Where Can I Find...?

Use the following quick tips for looking up member information in *Retirement Online*.

### Where can I find a member's contribution rate?

From your Employer Reporting Dashboard, click the *Member Contribution Rates* link. You'll find the contribution rate for each member at your location, as well as their NYSLRS ID, registration number, tier and date of membership.

### When was the last time I reported a member?

From your Account Homepage, click the *Access Employee Report History* button. Enter the NYSLRS ID, first name or last name of the member and click Search. You'll see recent report dates for the member, as well as the days, hours, earnings, contributions and payments that were last reported.

### Where can I find changes to member loan and service credit deductions?

From your Employer Reporting Dashboard, click the *Loan/SCP Deduction Notification* link. Enter the member's NYSLRS ID, first name, last name or location and click Search. You'll see the member's deduction information, as well as the previous and new deduction amounts.

### Where can I find a record of any excess or improper withholdings?

From your Employer Reporting Dashboard, click the *Improper Withholdings* link. Enter the payroll end date range or the ID number of a past report and click Search. You'll see any deducted amounts that were in excess of what was owed to NYSLRS. This may include pre-tax and post-tax contributions, loan payments and service credit purchase payments.

# Retirement Online

## What Are Errors and Warnings?

*Retirement Online* has been designed to ensure your monthly report is reviewed before the file is accepted and processed. If issues with the file or the member data being submitted are detected, you will receive an error or a warning.

### File Errors

When you upload your report, you may see a status message saying the report has file errors. There are two kinds of file errors: report errors and control errors.

A **report error** means there's a formatting issue with your file. This can be caused by spacing, empty or invalid rows, or mistakes in the first four columns of your file.

A **control error** means you have a data issue. This occurs when the total days, earnings, contributions or payments you manually entered into *Retirement Online* during the upload process do not match the totals in the file you uploaded.

Read the error messages, make the needed corrections to your file, and then re-upload it to *Retirement Online*. If there are no file errors, your report moves to the "Initiated" status. You are now ready to move on to reviewing your report. Read our quick guide on correcting file errors at [www.bit.ly/ro-file-errors](http://www.bit.ly/ro-file-errors).

### Errors and Warnings

Once you've initiated your report and before you submit it to NYSLRS, be sure to review your Report Summary page. There, you can see a section called Errors and Warnings Count.

If you have an **error**, it means there's a data issue with one or more rows in your file, such as an incorrect payroll end date or negative reported earnings. These rows must be corrected before submitting your report.

If you have a **warning**, it also means there's a data issue, such as an overpayment or underpayment of contributions or loans. Warnings should be reviewed because they indicate that you need to adjust something in your payroll system, but they won't prevent you from submitting the report.

You can use *Retirement Online* to correct errors and warnings. Just remember that if you submit the report before correcting any errors, the affected member's data will not be accepted by *Retirement Online*. Read our quick guide on correcting errors and warnings at [www.bit.ly/ro-errors-warnings](http://www.bit.ly/ro-errors-warnings).

## Member Annual Statements Are in Retirement Online

In the past, Member Annual Statements were either sent to you to distribute to your employees, or in some instances, mailed directly to your employees. Beginning this year, we provided all statements directly to our members – employers no longer need to distribute them.

All members can now view their Statements in *Retirement Online* ([web.osc.state.ny.us/retire/retirement\\_online/customers.php](http://web.osc.state.ny.us/retire/retirement_online/customers.php)). Under the “My Account Summary” section of their account home page, they should click the “View My Member Annual Statement” button to view, print and save.

Encourage your employees to receive their Statement faster next year by choosing to receive an email that will tell them when their Statement is ready in *Retirement Online*. On the home page of their *Retirement Online* account under “My Profile Information,” they should click the *update* link in the “Member Annual Statement by” field and choose “email” from the drop-down options.

It is very important for your employees to keep their contact information current to ensure that they receive their Statement and any other NYSLRS correspondence. The easiest and fastest way to do this is through *Retirement Online*.



### **Thomas P. DiNapoli** State Comptroller

*Executive Deputy Comptroller: Colleen Gardner*

*Deputy Comptroller: Andrea Goldberger*

*Assistant Comptroller: Joseph Ruggiero*

*Editor: Tracy Teschka*

*Writers: Patrick Ruddy and Michelle Hoehn*

*Graphic Artist: Kathleen Helman*

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Email or mail your comments to:

[nysretnews@osc.ny.gov](mailto:nysretnews@osc.ny.gov)

NYSLRS

110 State Street

Albany, NY 12244-0001



## Employer Billing Information Coming to Retirement Online

Later this summer, all billing-related information will be moving to *Retirement Online*. This includes estimates, projections, invoices, salary listings, prior years’ adjustments, and other employer billing data and tasks. You will also be able to view your Governmental Account Standards Board (GASB) information through the dashboard.

When the new Billing Dashboard becomes available in *Retirement Online*, staff who have been assigned the Billing security role will be informed and provided training materials that will help them access and navigate the new features. Only employers with the Billing security role will be able to access this dashboard.

If you have questions about assigning the Billing security role, please email us at [NYSLRS\\_Employer\\_Access@osc.ny.gov](mailto:NYSLRS_Employer_Access@osc.ny.gov), or call 866-805-0990 and select option 1 and then option 7.