Retirement Online Update

Payroll Users Group (September 5, 2019)

Office of the New York State Comptroller
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NYSLRS
New York State & Local Retirement System
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Member Contribution Rates Update

Mandatory Contribution Details

	Location Code	Report Code	Name
1	10001	010	130565585,Nme_person
2	10001	010	210077100,Nme_person
3	10001	010	270380712,Nme_person
4	10001	010	460188475,Nme_person
5	10001	010	400070887,Nme_person
6	10001	010	550206042,Nme_person
7	10001	010	580298626,Nme_person
8	10001	010	110568355,Nme_person
9	10001	010	150230588,Nme_person
10	10001	010	180188275,Nme_person
11	10001	010	280137629,Nme_person
12	10001	010	321436720,Nme_person
13	10001	010	530225735,Nme_person

Personalize | Find | View 100 | | Firs

Date Of Membership	Employment Instance	Annual Wage	Standard Work Day	Pay Frequency	Job Code	Benefit Plan
12/14/2006	1		8.00	Weekly	04500E	A15
06/26/1990	2		8.00	Weekly	02000E	89H
12/04/2006	1		8.00	Weekly	02000E	A15
12/22/2006	0		8.00	Weekly	04500E	89H
11/24/2006	0		8.00	Weekly	04200E	A15
11/16/2006	0		8.00	Weekly	04500E	89H
11/24/2006	0		8.00	Weekly	04500E	A15
10/02/2006	0		8.00	Weekly	04500E	89H
10/13/2006	0		8.00	Weekly	04500E	89H
10/05/2006	1		8.00	Weekly	04500E	89H
10/13/2006	0		8.00	Weekly	04500E	89H
02/11/2013	1		8.00	Weekly	04500E	A15
10/29/2006	1		8.00	Weekly	02000E	89H

Personalize | Find | View 100 | | First

ge	Standard Work Day	Pay Frequency	Job Code	Benefit Plan
	8.00	Weekly	04500E	A15
	8.00	Weekly	02000E	89H
	8.00	Weekly	02000E	A15
	8.00	Weekly	04500E	89H
	8.00	Weekly	04200E	A15
	8.00	Weekly	04500E	89H
	8.00	Weekly	04500E	A15
	8.00	Weekly	04500E	89H
	8.00	Weekly	04500E	89H
	8.00	Weekly	04500E	89H
	8.00	Weekly	04500E	89H
	8.00	Weekly	04500E	A15
	8.00	Weekly	02000E	89H

Notification Review Purpose

- We have received consistent feedback from employers regarding the way employer notifications function in Retirement Online
  - We have reviewed this feedback with NYSLRS support staff, and now would like to review the feedback and proposed changes with employers
- Once we have validated our proposals with employers, we will use these recommendations as the basis for a comprehensive redesign of the notification functionality in Retirement Online

Notification Types

There are two types of notifications in *Retirement Online*:

Actionable Notifications

Deletion process:

- User completes requested action. Notification removed from user's panel. Overnight batch removes same notification from panels of other users with the same security roles at that location.
- Removes once notification reaches 'Date Due' (whether or not action has been taken)

Examples:

- An RS6221 form must be uploaded
- A request to stop or start service credit deductions for a member

Informational Notifications

Deletion process:

- Notification stays on panel until user manually removes them

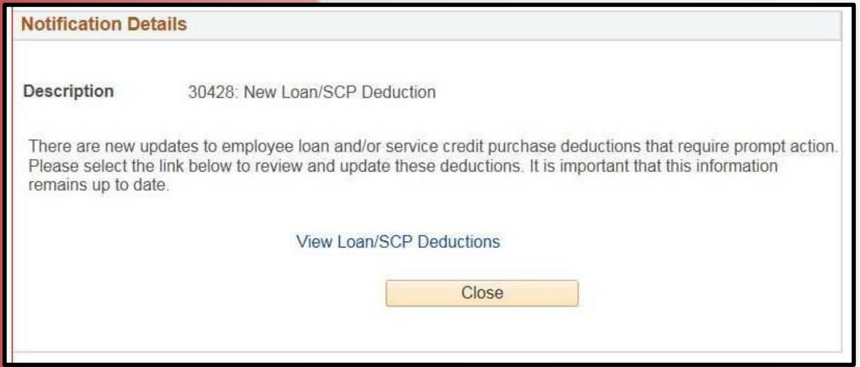
Examples:

- Monthly report data has been posted
- New contribution rates for Tier 6 members
- Member has completed their Tier Reinstatement process

Notification Types

There are two types of notifications in *Retirement Online*:

Actionable Notifications



Notification Details

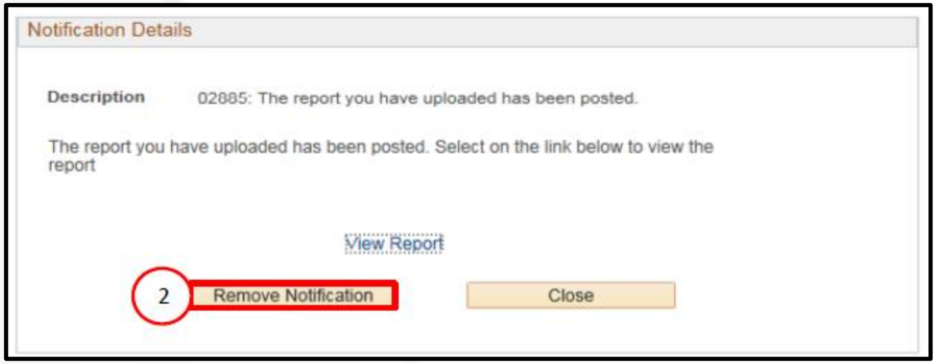
Description 30428: New Loan/SCP Deduction

There are new updates to employee loan and/or service credit purchase deductions that require prompt action. Please select the link below to review and update these deductions. It is important that this information remains up to date.

View Loan/SCP Deductions

Close

Informational Notifications



Notification Details

Description 02885: The report you have uploaded has been posted.

The report you have uploaded has been posted. Select on the link below to view the report

View Report

2 Remove Notification

Close

Feedback and Proposed Updates

Feedback	Proposed Update
Users struggle to understand which notifications are new/which are old	Add a “date created” field to the notification panel so users can determine which notifications are new. Change “Date Due” to “Notification Expiration Date”
Users struggle to understand which notifications have already been addressed by themselves/their peers	Update logic to clear or mark notifications as complete once addressed by employer users on the dashboard of all staff who have received the notification. Clear completed notifications from all dashboards at the end of the day.
On navigating to a notification, users struggle to complete the action and then go back to find and close out the notification	Add common identifiers, such as employee name, to notification title to allow users to quickly find the notification in question.
Users with multiple location codes struggle to differentiate between the different notifications they are being asked to respond to	Ensure location code is the first value to appear in the title for each notification received by users and allow employers to filter notifications by location code.
Some notifications can’t be cleared and reside on the dashboard until their due-dates	Ensure that each notification can either be cleared (if informational) or actioned for removal (if actionable).

Feedback and Proposed Updates

Feedback	Proposed Update
No easy way to export all of the notifications displaying to filter/decide which should be addressed	Add “export to excel” function for the notification panel to allow users to view all notifications and make notes offline.
Addressing notifications generally requires too much follow-up in other pages/screens/correspondence and makes it difficult to complete the actions being requested by NYSLRS	Update notification language and text to include the appropriate information in the notification that fully allows the employer to action the notification – view the notification as a correspondence replacement.
Users would like to be able to access notifications that have been automatically removed from their panels	Have a way for users to access old notifications (at least for a period of time)

Feedback and Proposed Updates

Feedback	Proposed Update
Some employers seem to be unaware about the links in the Employer Dashboard or do not regularly check them to see if there is new information available.	In the Employer Dashboard – Add an asterisk (or the word NEW) next to any of the links when an update has been made to Improper Withholdings, Member Contribution Rates, etc.
Employers would like to be able to sort & filter notifications based on applied criteria within Retirement Online.	If a sort functionality is added to the Notifications panel on the Homepage, allow it to save the last sort and not revert back to a default. Allow employers to customize what they see displayed in the panel based on their preference (most recently received, most imminent due date, actionable, etc.)
Notifications are tied to security roles but Security Administrators may only want someone to have the security role for functionality purposes but do not want the person to receive any notifications.	Add a “Receives Applicable Notifications” radio button to the manage security access page so that Security Administrators can dictate if someone receives notifications or not.
Some Employers are receiving far too many paper letters based on the amount of people they have tied to a security role and a notification that also results in a paper letter (+ letter)	Add a “Receives Corresponding Paper Letters” radio button to the manage security access page so that Security Administrators can dictate if someone receives the corresponding paper letter or not.

Feedback and Proposed Updates

Proposed Update
Create a Notifications Dashboard (in addition to the panel on Account Homepage). Dashboard would function more like email. Dashboard would contain the following features: • Functionality similar to Reporting Dashboard where employers would enter a location code then click “Go”   • This would allow users with access to multiple location codes the ability to see all of the notifications pertaining a particular location at once • A “Trash” feature that would retain deleted/removed notifications for a certain period of time so users can go back and see old notifications but would not keep ALL notifications indefinitely. • The ability to mark as ‘read’ or ‘complete’ • When an actionable notification has been acted on and the overnight batch removes it from their co-workers Notification Dashboard, co-workers can still see the removed notification in their trash. If it is marked with a time stamp of when it was actioned and the User ID of who actioned it, workers will know exactly who took the action and when

Questions & Inquiries

- **If you have further comments or feedback on the notification proposals we've discussed today, please send your feedback to: RetirementHelpDesk@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 – please note that we have a new call tree. At the main menu, press "1" if calling as an employer, and then select the appropriate option:

For Retirement Online password resets, help logging in or a locked account, **Press 1**
For help submitting or uploading your file, **Press 2**
For help with member enrollment online or using job codes, **Press 3**
For other assistance with Retirement Online, **Press 4**
For questions regarding Reporting, Adjustments and Variable Contribution Rates, **Press 5**
For questions regarding Membership Registrations, **Press 6**
For questions regarding Employer Billing, including GASB, **Press 7**
For questions regarding Audits, Seminars, Plan Adoptions or general inquiries, **Press 8**