Retirement Online Update

Payroll Users Group (September 6, 2018)

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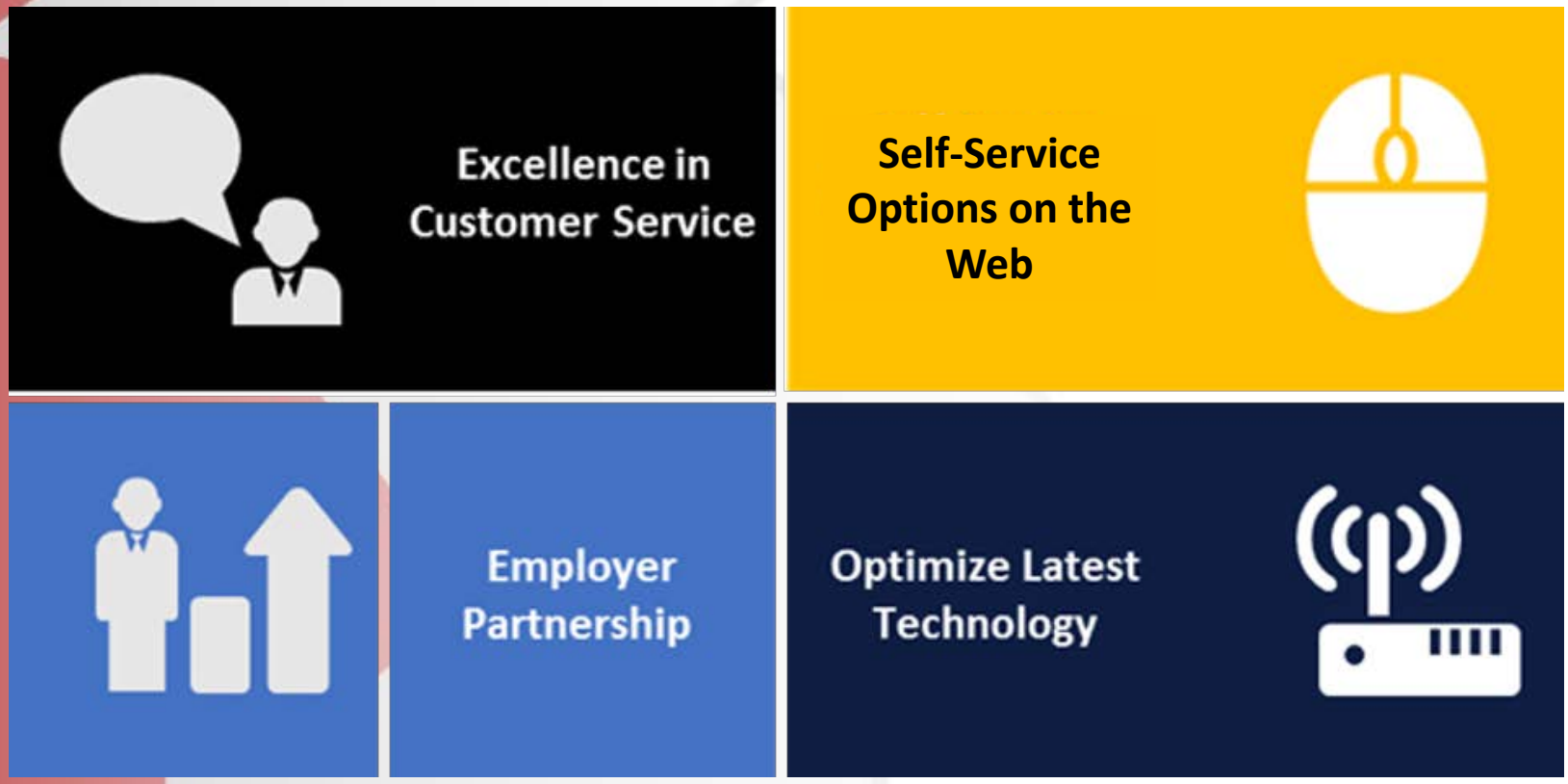
NYSLRS
New York State & Local Retirement System
Colleen C. Gardner, Executive Deputy Comptroller

Discussion Topics

- Retirement Online Updates
- State Agency Certification & Next Steps
- Retirement Employee Acknowledgement Program (REAP) Replacement
- Questions

Our Vision for the New *Retirement Online*



Where Are We?

Release 1 — 2017
Member Self Service
Employer Self Service

Release 2 — 2019
Member and
Employer Processes

Release 3 — TBD
Retiree Processes
(Pension Payroll)

Release 2 Update

We want to provide the best product to our employers and ensure you have what you need to be prepared to interact with NYSLRS using Retirement Online

- We listened to our employers and heard your feedback about readiness to use the New Retirement Online
- Therefore, we **extended deadlines of our certification process into the fall of 2018** while employers will be able to start using **Retirement Online in the Spring of 2019**

Retirement Online Updates

- **Thank you to those employers that have completed Bronze and Silver certification!**
- **New Key Dates:**
  - Bronze Certification Due: September 30, 2018
  - Silver Certification Due: December 2018
  - Targeted System Upgrade & Retirement Online Release 2: Spring 2019
- **Please continue to complete Bronze and Silver certification activities**

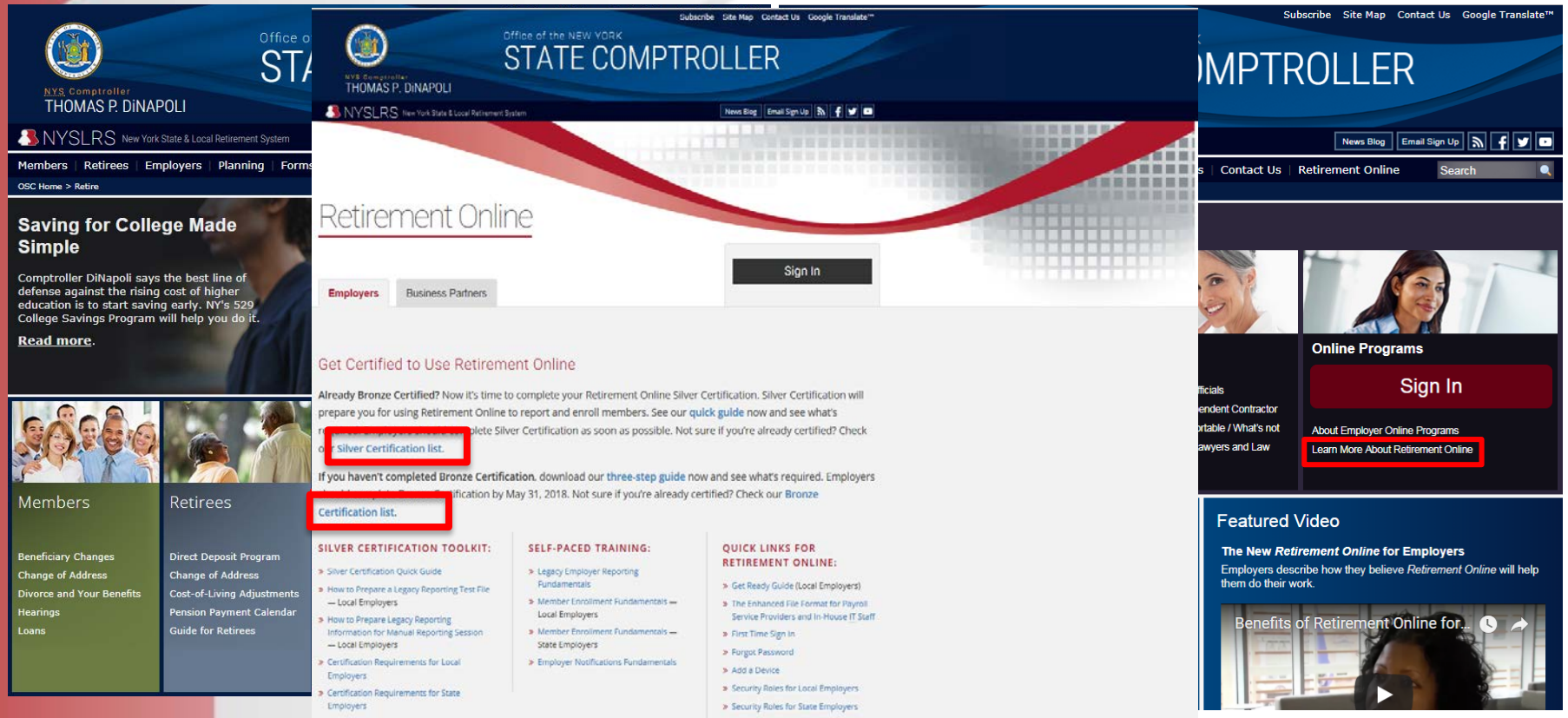
State Employer Certification Status

Total State Employers	388
State Employers NOT Bronze Certified	64/335 (19%)
BSC Employers NOT Bronze Certified	2/53 (4%)
Total State Employers NOT Bronze Certified	66/388 (17%)

Total State Employers	388
State Employers NOT Silver Certified	86/335 (26%)
BSC Employers NOT Silver Certified	3/53 (6%)
Total State Employers NOT Silver Certified	89/388 (23%)

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!



If You Need to Complete Bronze Certification

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.

1. Make sure your employer has designated your **Security and Contact Administrators**
2. Your **Contact Administrator** will need **to Sign In to Retirement Online** and update your **employer contacts**
3. Your **Security Administrator** will need **to Sign In to Retirement Online** and give the appropriate employer contacts the following Security Roles:
   - **Payroll**
   - **Personnel**

You'll have to complete these steps to move on to Silver Certification!

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.*

If You Need to Complete Silver Certification

Once your Security Administrator has designated your Payroll and Personnel security, the individual with the Personnel security role will receive an email from NYSLRS, requesting that the complete the “Member Enrollment Fundamentals – State Employers” Course.

Make sure you complete the survey at the end using the same email tied to your employer Retirement Online account – this is how we give you credit!

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

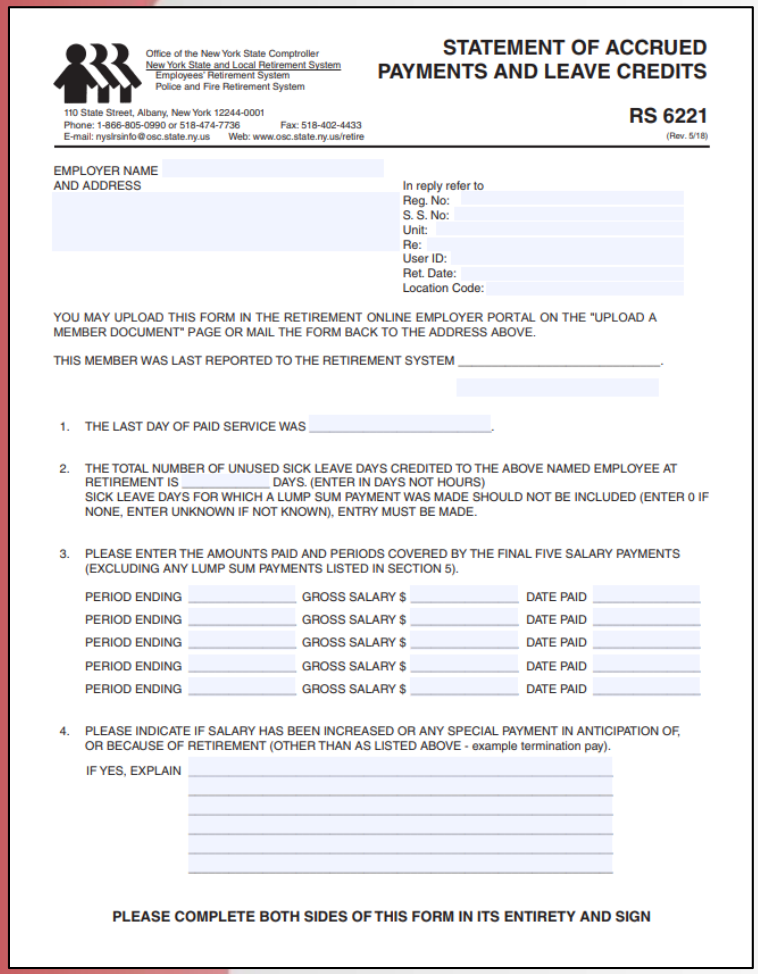
REAP Replacement

- **What is REAP?:** The Retired Employees Acknowledgement Program (REAP) was the electronic tool used by many employers to submit the Statement of Accrued Payments and Leave Credits (RS6221) prior to February 2018
- **How are RS6221 forms being submitted today?:** Since REAP decommissioning, employers have been downloading the RS6221 form and mailing or faxing them to NYSLRS
  - https://www.osc.state.ny.us/retire/forms/rs6221.pdf

- **Starting this fall, you'll have an electronic method to submit these forms again – next, we'll walk you through the changes.**

The RS6221 Form

Current Form



Office of the New York State Comptroller
New York State and Local Retirement System
Employees' Retirement System
Police and Fire Retirement System

110 State Street, Albany, New York 12244-0001
Phone: 1-866-805-0990 or 518-474-7736 Fax: 518-402-4433
E-mail: nyslrsinfo@osc.state.ny.us Web: www.osc.state.ny.us/retire

STATEMENT OF ACCRUED PAYMENTS AND LEAVE CREDITS

RS 6221
(Rev. 5/18)

EMPLOYER NAME
AND ADDRESS

In reply refer to
Reg. No:
S. S. No:
Unit:
Re:
User ID:
Ret. Date:
Location Code:

YOU MAY UPLOAD THIS FORM IN THE RETIREMENT ONLINE EMPLOYER PORTAL ON THE "UPLOAD A MEMBER DOCUMENT" PAGE OR MAIL THE FORM BACK TO THE ADDRESS ABOVE.

THIS MEMBER WAS LAST REPORTED TO THE RETIREMENT SYSTEM _____.

1. THE LAST DAY OF PAID SERVICE WAS _____.

2. THE TOTAL NUMBER OF UNUSED SICK LEAVE DAYS CREDITED TO THE ABOVE NAMED EMPLOYEE AT RETIREMENT IS _____ DAYS. (ENTER IN DAYS NOT HOURS)
SICK LEAVE DAYS FOR WHICH A LUMP SUM PAYMENT WAS MADE SHOULD NOT BE INCLUDED (ENTER 0 IF NONE, ENTER UNKNOWN IF NOT KNOWN), ENTRY MUST BE MADE.

3. PLEASE ENTER THE AMOUNTS PAID AND PERIODS COVERED BY THE FINAL FIVE SALARY PAYMENTS (EXCLUDING ANY LUMP SUM PAYMENTS LISTED IN SECTION 5).

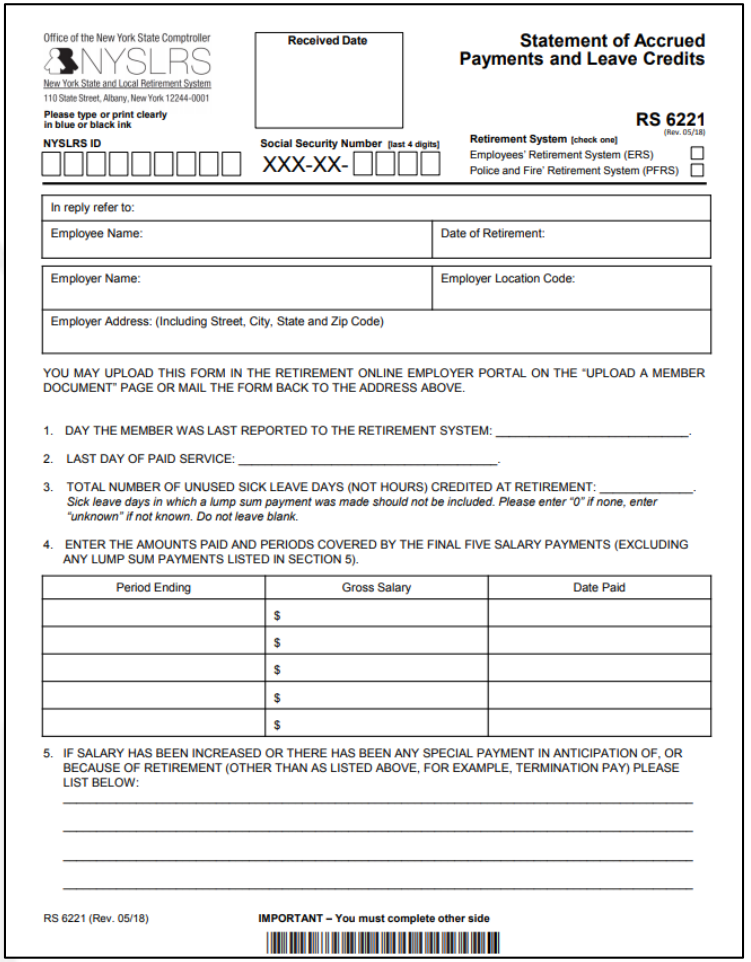
PERIOD ENDING _____ GROSS SALARY $ _____ DATE PAID _____
PERIOD ENDING _____ GROSS SALARY $ _____ DATE PAID _____
PERIOD ENDING _____ GROSS SALARY $ _____ DATE PAID _____
PERIOD ENDING _____ GROSS SALARY $ _____ DATE PAID _____
PERIOD ENDING _____ GROSS SALARY $ _____ DATE PAID _____

4. PLEASE INDICATE IF SALARY HAS BEEN INCREASED OR ANY SPECIAL PAYMENT IN ANTICIPATION OF, OR BECAUSE OF RETIREMENT (OTHER THAN AS LISTED ABOVE - example termination pay).

IF YES, EXPLAIN _____

PLEASE COMPLETE BOTH SIDES OF THIS FORM IN ITS ENTIRETY AND SIGN

Release 2 Form



Office of the New York State Comptroller
NYSLRS
New York State and Local Retirement System
110 State Street, Albany, New York 12244-0001

Received Date

Statement of Accrued Payments and Leave Credits

Please type or print clearly in blue or black ink

RS 6221
(Rev. 05/18)

NYSLRS ID

Social Security Number [last 4 digits] XXX-XX-

Retirement System [check one]
Employees' Retirement System (ERS) ☐
Police and Fire' Retirement System (PFRS) ☐

In reply refer to:	
Employee Name:	Date of Retirement:
Employer Name:	Employer Location Code:
Employer Address: (Including Street, City, State and Zip Code)	

YOU MAY UPLOAD THIS FORM IN THE RETIREMENT ONLINE EMPLOYER PORTAL ON THE "UPLOAD A MEMBER DOCUMENT" PAGE OR MAIL THE FORM BACK TO THE ADDRESS ABOVE.

1. DAY THE MEMBER WAS LAST REPORTED TO THE RETIREMENT SYSTEM: _____.
2. LAST DAY OF PAID SERVICE: _____.
3. TOTAL NUMBER OF UNUSED SICK LEAVE DAYS (NOT HOURS) CREDITED AT RETIREMENT: _____.
Sick leave days in which a lump sum payment was made should not be included. Please enter "0" if none, enter "unknown" if not known. Do not leave blank.
4. ENTER THE AMOUNTS PAID AND PERIODS COVERED BY THE FINAL FIVE SALARY PAYMENTS (EXCLUDING ANY LUMP SUM PAYMENTS LISTED IN SECTION 5).

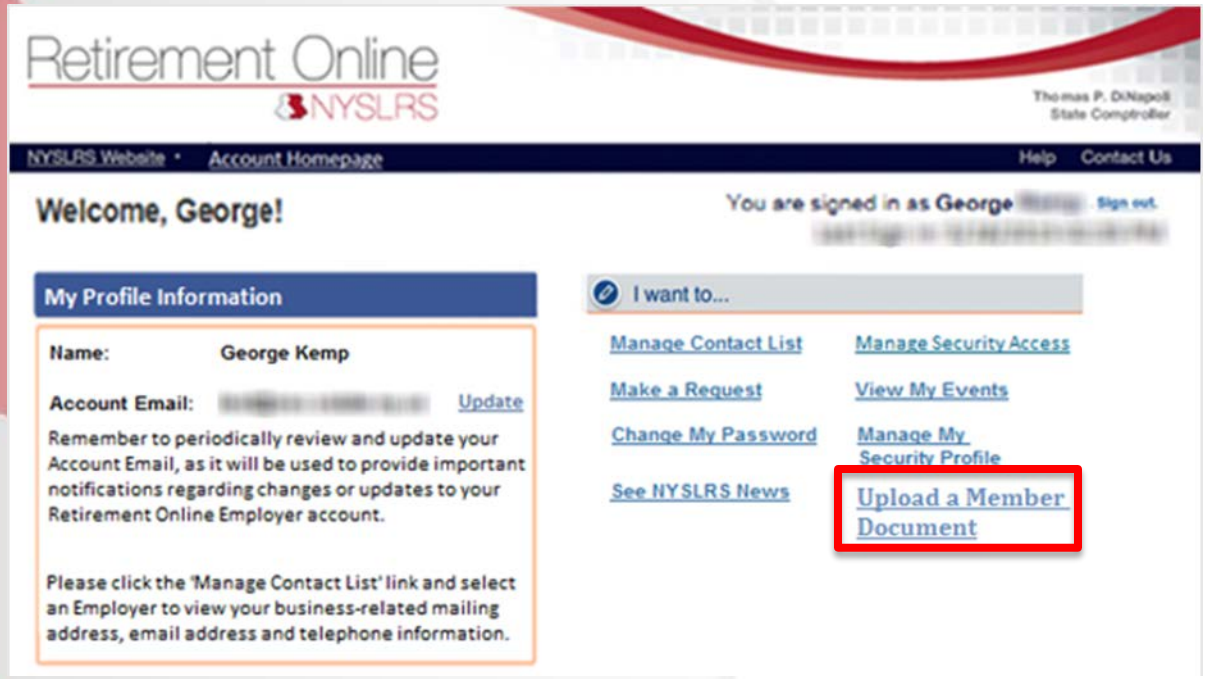
Period Ending	Gross Salary	Date Paid
	$	
	$	
	$	
	$	
	$	

5. IF SALARY HAS BEEN INCREASED OR THERE HAS BEEN ANY SPECIAL PAYMENT IN ANTICIPATION OF, OR BECAUSE OF RETIREMENT (OTHER THAN AS LISTED ABOVE, FOR EXAMPLE, TERMINATION PAY) PLEASE LIST BELOW:
_____
_____
_____
_____

RS 6221 (Rev. 05/18) **IMPORTANT – You must complete other side**

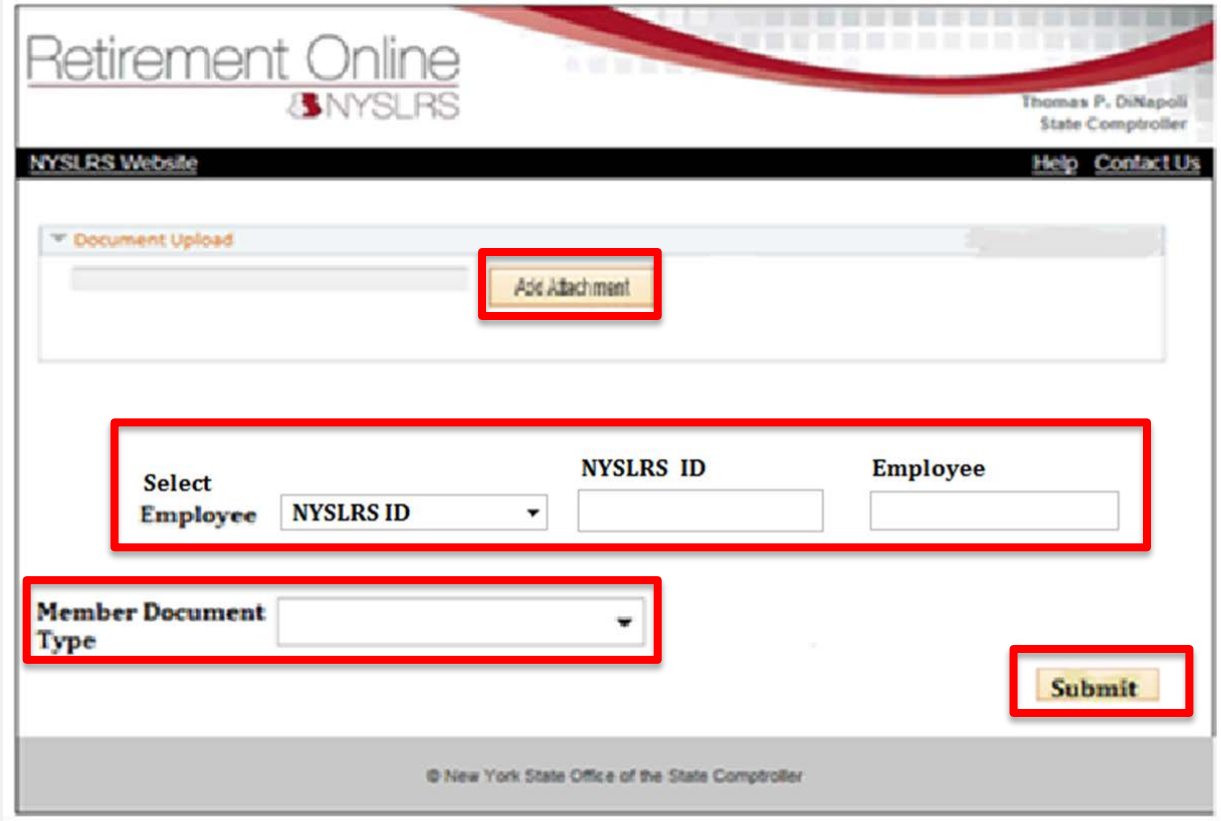
Submitting the RS6221 in Retirement Online

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”



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!



Benefits of Submitting the RS6221 in Retirement Online

- The form gets to NYSLRS as quickly as possible – allowing us to more quickly calculate the benefits owed to your employee and close out their retirement
- The electronic version of the form is delivered immediately to the examiner processing your employee's retirement, again increasing the speed with which we are able to close out the retirement case
- It's a good way to practice using Retirement Online for something you already have to do prior to the full Release 2 coming next year!

ANY QUESTIONS?

Don’t Forget!

- **Bronze Certification Target: September 30, 2018**
- **Silver Certification Target: December 2018**
- **For any questions regarding the blue/green employer access forms (or if you need a new one):**
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