

Retirement Online Update

Payroll Users Group (February 7, 2019)



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 Release 2 Timeline
- State Agency Certification Status
- Key Dates & Activities
- What will be Viewable After Go-Live?
- Questions

Release 2 Timeline

February 4 – Mid-May

Mid May

Refresh, Retrain,
and Practice

Go-Live

- Re-take Enrollment/Notification Training
- Sign into the Retirement Online Training environment and practice enrolling members
- Attend a webinar or training support session
 - We will send Email invitations for Ask Me Anything sessions
 - Member Enrollment Practice session sign up available at the following link:
https://osc.state.ny.us/retire/retirement_online/events.php
- 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



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
- The above Employer Contacts successfully log in to *Retirement Online*



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

State Employer NOT Bronze Certified

BSC Employers NOT Bronze Certified

Total State Employers NOT Bronze Certified

388

60/335 (18%)

0/53 (0%)

60/388 (16%)



Total State Employers

State Employers NOT Silver Certified

BSC Employers NOT Silver Certified

Total State Employers NOT Silver Certified

388

73/335 (22%)

0/53 (0%)

73/388 (19%)

Retirement Online Updates: Certification

- **Key Dates:**

- Bronze Certification Due: **September 30, 2018 (Overdue)**
 - Check your employer's Bronze Status:
[https://osc.state.ny.us/retire/retirement online/word and pdf documents/bronze-certified-employers.pdf](https://osc.state.ny.us/retire/retirement%20online/word%20and%20pdf%20documents/bronze-certified-employers.pdf)
- Silver Certification Due: **January 9, 2018 (Overdue)**
 - Check your employer's Silver Status:
[https://osc.state.ny.us/retire/retirement online/word and pdf documents/silver-certified-employers.pdf](https://osc.state.ny.us/retire/retirement%20online/word%20and%20pdf%20documents/silver-certified-employers.pdf)
- System Upgrade & Retirement Online Release 2: May 2019

If your employer is missing either Bronze or Silver Certification, contact our Retirement Online Employer Help Desk for next steps.

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

A stylized silhouette of a human head and shoulders in profile, facing right. The silhouette is rendered in a light gray color with a thin white outline. The background is white, and the silhouette is positioned on the left side of the frame. The text 'KEY DATES & ACTIVITIES' is centered over the silhouette.

KEY DATES & ACTIVITIES

Dates & Activity Cutoffs

- Retirement Online will be taken down for upgrade starting on April 19, 2019
- Due to the way State Payroll files will be processed and return information automatically loaded into PayServ in the future, you may need to change the way you work and the data you input into PayServ around the Go-Live date
 - Cessation Dates
 - Loan and Service Credit Purchase Start/Stop/Modifications
 - Member Enrollments

Key Activities & Start/Stop Dates

Activity	Details
Cessation Date Updates	<p>Make all Cessation Date updates in PayServ received via existing letter process. On Release 2 goes live, Payroll Security holders will receive notifications for cessation dates, but they will automatically be loaded into PayServ. Payroll Security holders can also view contribution rates on the Member Contribution Rates page.</p>
Mandatory Member Enrollments	<p>Submit applications for all members hired <u>in PayServ</u> prior to April 17th, 2019 (NOTE: this is the date the member is entered into PayServ and NOT their employment or membership date). Any mandatory member hired in PayServ after this date will be automatically enrolled and their information loaded into PayServ. Payroll Security holders will be able to see New Hire information in Retirement Online on the New Hire Summary page. IMPORTANT: Continue reporting Optional Registrations through the current manual process until Release 2 Go-Live.</p>

Key Activities & Start/Stop Dates

Activity	Details
Loan & Service Credit Purchase (SCP) Stop Deduction	Complete all Stop Deductions received through the existing process effective May 30 th or earlier. Stop deductions with an effective date of June 1 st or later will automatically be loaded into PayServ in the State Payroll return file and will not require action on the part of the employer. Payroll security holders can view Start/Stop/Modify deduction changes on the Loans/SCP Deduction change page.
Loan & Service Credit Purchase (SCP) Start/Modify Deduction	Complete all Start/Modify Deductions in PayServ received through existing process. After Go-Live in May, all new Start/Modify deductions will be automatically loaded into PayServ through the State Payroll return file. Payroll security holders can view Start/Stop/Modify deduction changes on the Loans/SCP Deduction Change page.

Job Transactions in PayServ

- State Payroll files will be processed on a lag. To make sure that you have necessary reporting information by a desired check date, follow the calendar below (example given is May 2019):

Mon. 05/13	Tue. 05/14	Wed. 05/15	Thu. 05/16	Fri. 05/17
	Online Transaction Cutoff Date for PP3 – Check date of 5/29: Enter all Job Transactions into PayServ by 6PM if needed in PayServ by Fri. 05/17. Payroll sends to NYSLRS EOD.	NYSLRS Processes Job Transactions <i>5/15 Paycheck*</i>	NYSLRS Processes Job Transactions	NYSLRS sends post processing file for Retirement, Enrollment, and Deductions for PP3 Check Date 5/29. Automatically loaded into PayServ.
Mon. 05/20	Tue. 05/21	Wed. 05/22	Thu. 05/23	Fri. 05/24
	Online Transaction Cutoff Date for PP4 – Check date of 6/6: Enter all Job Transactions into PayServ by 6PM if needed in PayServ by Fri. 05/24. Payroll sends to NYSLRS EOD.	NYSLRS Processes Job Transactions	NYSLRS Processes Job Transactions <i>5/23 Paycheck*</i>	NYSLRS sends post processing file for Retirement, Enrollment, and Deductions for PP4 Check Date 6/6. Automatically loaded into PayServ.
Mon. 05/27	Tue. 05/28	Wed. 05/29	Thu. 05/30	Fri. 05/31
		<i>5/29 Paycheck*</i>		

*Days, Earnings, and Contribution information viewable in Retirement Online on Thurs.

A large, stylized silhouette of a human head and shoulders is positioned on the left side of the slide. The silhouette is filled with a solid red color, while the rest of the slide background is white. The silhouette is facing right.

WHAT WILL BE VIEWABLE AFTER GO- LIVE?

View the notifications, pages, and information available to each State Employer Security Role on the Retirement Online Learn More and Get Ready page at the following link:

https://osc.state.ny.us/retire/retirement_online/word_and_pdf_documents/state-roles.pdf

Employer Reporting Dashboard

Retirement Online - Training Development



NYSLRS Website • Account Homepage

*Location:  VIEW MORE BY LOCATION

Go

Regular reports for the month of August, 2018 and earlier may now be submitted.



[Search by Employee](#)

[Improper Withholdings](#)

[Member Contribution Rates](#)

[Loan/SCP Deduction Notification](#)

Reports

Find | View All |   First ◀ 1-4 of 4 ▶ Last

Report Date	Report ID	Report Status	Report Format	Report Type	Days	Earnings	Pre Tax Contributions	Post Tax Contributions	Loan Payments	Pre Tax Service Credit Payments	Post Tax Service Credit Payments	Action
1 08/31/2018	201901400422	Posted	Legacy	Regular	40.00	\$3,015.00	\$100.00		\$100.00	\$100.00		
2 06/30/2018	201901400421	Posted	Legacy	Regular	20.00	\$2,000.00	\$50.00		\$100.00			
2 06/30/2018	201901400421	Posted	Legacy	Regular	20.00	\$2,000.00	\$50.00		\$100.00			
4 11/30/2017	201712400421	Posted	Legacy	Regular	20.00	\$22,000.00						

Report Summary

Post Submission Process

[Report Summary](#) | [Report Details](#) | [Warnings](#) | [New Hire Summary](#)

Location [REDACTED] **Report Date** 01/29/2019 **Report Format** Enhanced [Return to Dashboard](#)
Report ID 201901100287 **Report Status** Posted **Report Type** Regular

Report Summary

<p>Employer Reported:</p> <table style="width: 100%;"> <tr><td>Total Days Reported</td><td style="text-align: right;">118.50</td></tr> <tr><td>Total Earnings Reported</td><td style="text-align: right;">\$9,540.00</td></tr> <tr><td colspan="2">Contributions</td></tr> <tr><td> Pre Tax</td><td style="text-align: right;">\$275.50</td></tr> <tr><td> Post Tax</td><td style="text-align: right;">\$0.00</td></tr> <tr><td colspan="2">Loans</td></tr> <tr><td> Post Tax</td><td style="text-align: right;">\$0.00</td></tr> <tr><td colspan="2">Service Credit Purchase</td></tr> <tr><td> Pre Tax</td><td style="text-align: right;">\$0.00</td></tr> <tr><td> Post Tax</td><td style="text-align: right;">\$0.00</td></tr> <tr><td>Total Withholding Reported</td><td style="text-align: right;">\$275.50</td></tr> <tr><td>Excess Withholdings</td><td style="text-align: right;">\$179.50</td></tr> </table>	Total Days Reported	118.50	Total Earnings Reported	\$9,540.00	Contributions		Pre Tax	\$275.50	Post Tax	\$0.00	Loans		Post Tax	\$0.00	Service Credit Purchase		Pre Tax	\$0.00	Post Tax	\$0.00	Total Withholding Reported	\$275.50	Excess Withholdings	\$179.50	<p>NYSLRS Accepted:</p> <table style="width: 100%;"> <tr><td>Total Days Accepted</td><td style="text-align: right;">118.50</td></tr> <tr><td colspan="2">Contributions</td></tr> <tr><td> Pre Tax</td><td style="text-align: right;">\$96.00</td></tr> <tr><td> Post Tax</td><td style="text-align: right;">\$0.00</td></tr> <tr><td colspan="2">Loans</td></tr> <tr><td> Post Tax</td><td style="text-align: right;">\$0.00</td></tr> <tr><td colspan="2">Service Credit Purchase</td></tr> <tr><td> Pre Tax</td><td style="text-align: right;">\$0.00</td></tr> <tr><td> Post Tax</td><td style="text-align: right;">\$0.00</td></tr> <tr><td>Total Withholdings Accepted</td><td style="text-align: right;">\$96.00</td></tr> </table>	Total Days Accepted	118.50	Contributions		Pre Tax	\$96.00	Post Tax	\$0.00	Loans		Post Tax	\$0.00	Service Credit Purchase		Pre Tax	\$0.00	Post Tax	\$0.00	Total Withholdings Accepted	\$96.00
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Post Tax	\$0.00																																												
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Comments

Errors and Warnings Count | 2

Message	Type	Count
Reported Pre Tax Contributions are more than the required amount.	Warning	3
Pre Tax Contributions previously reported for the Payroll End Date.	Warning	1

I agree the submission of this Employer Report.

New Hire Summary





Post Submission Process

Report Summary | Report Details | Warnings | **New Hire Summary**

Location **XXXX** Report Date 11/29/2018 Report Format Enhanced [Return to Dashboard](#)
Report ID 201811400421 Report Status Posted Report Type Enroll/Job

SSN First Name Last Name

New Hire Summary

Find  |  | First  1 of 1  Last

SSN (Last 4)	NYSLRS ID	Employment Instance	First Name	Last Name	Contribution Rate
XXXXX6789	R12345678	3	Emma	Reign	3%

The NYSLRS IDs and Employment Instances listed above are required fields for existing employees on the employer report. Please download this information for your records.

Improper Withholdings

Retirement Online - Training Development



[NYSLRS Website](#) • [Account Homepage](#)

*Location Code

[Return to Dashboard](#)

Payroll End Date

From

Payroll End Date To


Report ID


Improper Withholdings

Location	Report ID	NYSLRS ID	Employment Instance	First Name	Last Name	Contribution Type	Excess Amount
	201811400421	R12666472	2	Paula	Smith	Pre Tax Contribution	\$100.00
	201811400421	R12666472	2	Paula	Smith	Loan Payment	\$100.00
	201811400421	R12666472	2	Paula	Smith	Post Tax Contributions	\$100.00
	201811400421	R12666472	2	Paula	Smith	Pre Tax Service Credit Payment	\$100.00
	201811400421	R12666472	2	Paula	Smith	Post Tax Service Credit Payment	\$100.00
	201901400421	R10452050	1	David	Brown	Pre Tax Contribution	\$50.00
	201901400421	R10452050	1	David	Brown	Loan Payment	\$100.00
	201901400422	R11932064	0	Samara	Davis	Loan Payment	\$100.00
	201901400422	R11932064	0	Samara	Davis	Pre Tax Service Credit Payment	\$100.00
	201901400422	R12666472	2	Paula	Smith	Pre Tax Contribution	\$100.00

Member Contribution Rates


Mandatory Contribution Rates


*As Of Date 

NYSLRS ID 

First Name

Last Name

Tier 

Location Code 

Retirement System

Search

Clear

Mandatory Contribution Details

Personalize | Find | View All |   First 1-3 of 3 Last

	Location Code	Name	NYSLRS ID	Registration Number	Tier	Retirement System	Contribution Rate Effective As Of	Mandatory Contribution Rate (%)	Actual/Estimated	Date Of Membership	Employment Instance	Last Updated Date
1		Smith,Paula	R12666472	40018731	4	ERS	05/01/2011	0.00 NA		05/17/2001	2	
2		Brown,David Clinton	R10452050	37816378	4	ERS	04/01/2011	0.00 NA		03/17/1995	1	
3		Davis,Samara	R11932064	36826923	4	ERS	03/01/2002	0.00 NA		06/01/1983	1	

Loan/SCP Deduction Notifications

Retirement Online - Training Development


NYSLRS Website • Account Homepage

Loan/SCP Deduction Notification

*As Of Date

NYSLRS ID

First Name

Last Name

Location

If you are a non-State employer, please review and take action on the updates to employee loan and/or service credit purchase deductions indicated below. State employers should make note of the updates to their employee loan and/or service credit purchase deductions.

														Find	View All		First	1-7 of 7	Last
	Location	NYSLRS ID	Name	Registration Number	Retirement System	Last Four Digits of SSN	Deduction Type	Deduction Status	Previous Deduction	New Deduction	Pre Tax Deduction Amount	Post Tax Deduction Amount	Payroll Frequency	Last Updated Date					
1	05125	R10000288	Ms Anna Smith	34931873	ERS	0637	Loan	Stop Deduction	\$213.00	\$213.00	\$0.00	\$0.00	B	12/17/2018					
2	01067	R10036752	Mr Cosmo Kramer	41480070	ERS	8914	Loan		\$183.00	\$88.00	\$0.00	\$0.00	B						
3	01067	R10036752	Mr Cosmo Kramer	41480070	ERS	8914	Loan		\$183.00	\$88.00	\$0.00	\$0.00	B						
4	01067	R10036752	Mr Cosmo Kramer	41480070	ERS	8914	Loan		\$183.00	\$88.00	\$0.00	\$0.00	B						
5	01067	R10036752	Mr Cosmo Kramer	41480070	ERS	8914	Loan	Stop Deduction	\$183.00	\$183.00	\$0.00	\$0.00	B	11/19/2018					
6	05100	R10092135	Mr Samuel Powers	50159029	ERS	0641	Loan		\$12.00	\$12.00	\$0.00	\$0.00	B						
7	30455	R10640939	Mr Nme_person 220337627	38908067	ERS	7627	Loan	Stop Deduction	\$146.00	\$146.00	\$0.00	\$0.00	B	01/20/2019					

Employee Report History Search

Retirement Online - Training Development
NYSLRS

NYSLRS Website • Account Homepage

Employee Report History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

NYSLRS ID: begins with

First Name: begins with

Last Name: begins with Smith

Search

Clear

Basic Search



Save Search Criteria

Search Results

View AllFirst 1-2 of 2 Last

NYSLRS ID	First Name	Last Name
R10016684	John	Smith
R12666472	Paula	Smith

Employee Report History

Retirement Online - Training Development

 NYSLRS

[NYSLRS Website](#) • [Account Homepage](#)

Employee Report History

NYSLRS ID R12666472 Display Ms Paula Smith
Name

[Return to Dashboard](#)

Location	<input type="text"/>	Report Date	<input type="text"/>
Report Type	<input type="text"/>	Report ID	<input type="text"/>
			<input type="button" value="Search"/>

Report Details

Report Date	Report ID	Empl Record	Location	Report Type	Days	Hours	Earnings	Accepted Pre-Tax Contributions	Accepted Post-Tax Contributions	Loan Payments	Pre Tax Service Credit	Post Tax Service Credit	
06/30/2018	201811400421	2		Regular	20.00	80.00	\$2,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	View
08/31/2018	201901400422	2		Regular	20.00	160.00	\$1,507.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	View

[Return to Search](#) [Previous in List](#) [Next in List](#)

Employee Days, Earnings & Contributions

Employee Report History

NYSLRS ID R12666472 Display Ms Name

Location

Report Type

Report Details

Report Date	Report ID	Empl Record
06/30/2018	201811400421	
08/31/2018	201901400422	

[Return to Search](#) [Previous](#)

Days Earnings & Contributions

Days & Earnings Details Contributions Details

NYSLRS ID R12666472 First Name Paula Location [REDACTED]
 Empl Instance 2 Last Name Smith Member Y
 Payroll End Date 06/30/2018

Source Data Summary

Days	20.00	Pensionable Earnings	\$2,500.00	Contributions	\$0.00	Loan Payments	\$0.00	Service Credit Payments	\$0.00
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Days Details

Report ID	Adj Sequence	Days	Service Type	Account Type	Employee Account	Pay Check Date	Created At
201811400421	0	20.00	General	Mandatory		10/31/2018	11/29/2018

Earnings Details

Report ID	Adj Sequence	Earnings Type	Earnings Type Description	Account Type	Earnings Hours	Reported Earnings Amount	Pensionable Earnings Amount	Employee Account	Finance Group ID	Pay Check Date	Created At
201811400421	0	REG	Regular Earnings	Mandatory	80.00	\$2,500.00	\$2,500.00			10/31/2018	11/29/2018

[Return](#)

Don't Forget!

- **Bronze Certification Target: September 30, 2018 (Overdue)**
- **Silver Certification Target: January 9, 2019 (Overdue)**
- **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
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- **For help with signing in, certification, or Refresh & Practice activities:**
 - Please contact the Retirement Online Employer Help Desk at RetirementHelpDesk@osc.ny.gov
 - Or by phone at (844) 619-9614