

Payroll User Group Meeting

June 6, 2019

Presented by
Retirement Redesign Project & State Payroll Services



Office of the New York State Comptroller
Thomas P. DiNapoli

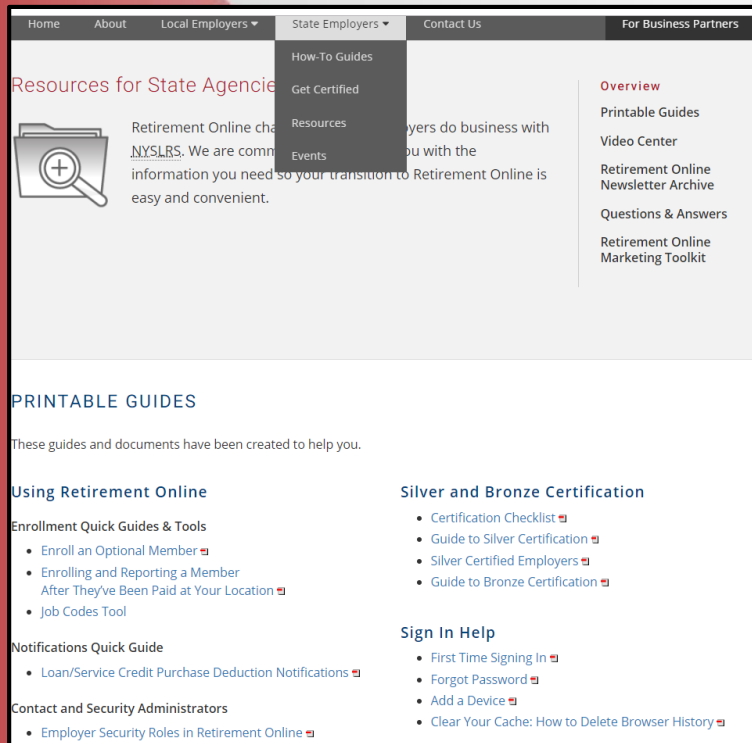
 **NYSLRS**
New York State & Local Retirement System
Colleen C. Gardner, Executive Deputy Comptroller

Today's Agenda

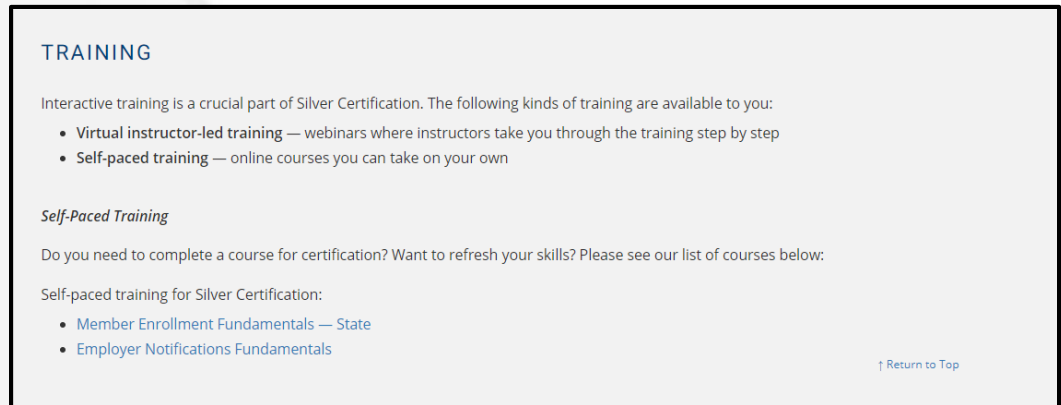
- Reference Materials
- Retirement Online Navigation and Notifications
- Member Enrollment Updates
- Other Updates
- Questions

Reference Materials

- We have support and reference materials available online at the following link:
 - https://osc.state.ny.us/retire/retirement_online/resources-state.php



The screenshot shows the Retirement Online website interface. At the top, there is a navigation bar with links for Home, About, Local Employers, State Employers, Contact Us, and For Business Partners. A dropdown menu is open under 'State Employers', listing 'How-To Guides', 'Get Certified', 'Resources', and 'Events'. The main content area is titled 'Resources for State Agencies' and includes a folder icon with a magnifying glass and text about NYSRLS. Below this, there are sections for 'PRINTABLE GUIDES', 'Using Retirement Online', 'Silver and Bronze Certification', and 'Sign In Help', each with a list of links to various guides and tools.



The screenshot shows the 'TRAINING' section of the Retirement Online website. It features a heading 'TRAINING' and a paragraph explaining that interactive training is a crucial part of Silver Certification. Below this, there are two bullet points: 'Virtual instructor-led training' and 'Self-paced training'. A sub-section titled 'Self-Paced Training' includes a paragraph asking if the user needs to complete a course and a list of two courses: 'Member Enrollment Fundamentals — State' and 'Employer Notifications Fundamentals'. A 'Return to Top' link is located at the bottom right of the section.

Notifications

- Distributed electronically based on Security Roles – will go to all security holders who have that role at the organization
 - Reference which notifications and letter go where in the following document:
https://osc.state.ny.us/retire/retirement_online/word_and_pdf_documents/state-roles.pdf
- If the notification is “Actionable,” it will clear once acted on. If the notification is “Informational” it will not disappear until cleared or it expires:
 - If notification is actionable and is completed, it will be removed from the dashboard of all security holders
- Employers with the correct security roles will receive an email notifying them that they have new notifications. When you receive these emails, you will be prompted to sign in to Retirement Online to view your notification(s)
- Employer Notification Descriptions in [Appendix](#) of this document

Email Detailing You Have New Notifications

New Notification Available from NYSLRS



NoReply@osc.state.ny.us

Fri 4/19/2019 11:32 PM



Dear NYSLRS Employer,

A new notification has been posted to your Portal Homepage that requires your attention. Please navigate to your Portal Homepage to view this notification and complete any required tasks or view/download any necessary documents.

This message was automatically generated and responses are not monitored. Please do not reply to this message. If you have any questions, please visit the "Contact Us" page of our website:

http://www.osc.state.ny.us/retire/contact_us/index.php

New York State and Local Retirement System, 110 State Street, Albany, New York 12244

Retirement Online (Account Homepage)

Notifications

[View 100](#) First 1-3 of 1190 Last

Description	Date Due
1 00000: Membership Form for R12872332 Required	05/08/2019
2 00000: Membership Form for R12869352 Required	05/08/2019
3 00000: Membership Form for R12872340 Required	05/08/2019

I want to...

- Make a Request
- Change My Password
- Manage My Security Profile
- View My Scheduled Events
- Find Documents
- Upload a Member Document**
- See NYSLRS News
- Manage Contact List
- Manage Security Access
- Update My Account Email
- Submit Disability Application

[Access Enrollment Dashboard](#)

Notifications

View All First 1-3 of 3 Last

Description	Date Due
1 [REDACTED] The report you have uploaded has been posted.	
2 [REDACTED] The report you have uploaded has been posted.	
3 [REDACTED] The report you have uploaded has been posted.	

I want to...

- Make a Request
- Change My Password
- Manage My Security Profile
- View My Scheduled Events
- Find Documents
- Upload a Member Document
- See NYSLRS News
- Manage Contact List
- Manage Security Access
- Submit Resolution For Official
- Request Plan Upgrade
- Update My Account Email
- Submit Disability Application

[Access Reporting Dashboard](#) [Access Enrollment Dashboard](#) [Access Employee Report History](#)

My Cases

*Assign the "Payroll" security role to get access to the Employer Reporting Dashboard

Retirement Online (Reporting Dashboard)

*Location:

[Improper Withholdings](#) [Member Contribution Rates](#) [Loan/SCP Deduction Notification](#)

Regular reports for the month of January, 2019 and earlier may now be submitted.

Reports Find | View All | | First 1-5 of 5 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 12/14/2018	201812002005	Posted	Enhanced	Regular	25,800.40	\$3,835.60	\$67,076.72		\$106,892.62	\$836.89	\$2,730.07	
2 02/26/2018	201812002004	Posted	Enhanced	Regular	0.00	\$0.00						
3 02/26/2018	201812002003	Posted	Enhanced	Regular	0.00	\$0.00						
4 12/11/2018	201812002002	Posted	Enhanced	Regular	25,549.40	\$3,835.60	\$68,147.62		\$106,600.65	\$836.90	\$2,679.42	
5 02/26/2018	201812002001	Posted	Enhanced	Regular	0.00	\$0.00						

*Location Code [Return to Dashboard](#)

Payroll End Date

From Payroll End Date To

Report ID

Improper Withholdings

Location

Find | View All | | First 1-10 of 78 Last

Payroll End Date	Report ID	NYSLRS ID	Employment Instance	First Name	Last Name	Contribution Type	Excess Amount
1 11/14/2018	201812002002			1 Alison		Pre Tax Contribution	\$87.93
2 11/14/2018	201812002002			2 Juliana		Pre Tax Contribution	\$31.72

*Loan/SCP Deduction change notifications are informational for State Employers – they are automatically loaded back into PayServ

Deficiencies & Service Credit Purchase

- Members still have the ability to define how they will purchase Mandatory and Optional service (either through payroll deduction or by paying NYSLRS directly). All of this information (Start/Stop/Modify) is visible on the Loan/SCP Deduction Change page.
- Deficiencies are calculated on a monthly basis and will automatically be passed back to PayServ for application. They will be reflected as Service Credit Purchase accounts.
- For State employers, this page is for your information; this information will automatically be passed back to PayServ. Please do not update/overwrite this information.

May 29th Deficiency Issue

- There was a mismatch in the timing for when State Payroll and NYSLRS applied the Tier 6 lookback for the April 17th paycheck, which caused a significant deficiency volume. We will review the timing for next year.
 - When this money was reported by State Payroll for May 29th paycheck, it was refunded as the deficiency accounts did not set up properly.
 - For the June 12th paycheck, members will receive refunds of the monies from the May 29th paycheck, and will simultaneously be charged the deficiency amount on the June 12th paycheck. For most members, this will mean no change in net June 12th pay.
 - Deficiencies should be paid off, and deductions back to normal, for the June 26th paycheck.

Notifications (Retirement Notice)

Notification Details

Description 00000: Retirement Notice

R12345678 has applied for retirement. Please go to the following link to upload the "Statements of Accrued Payments and Leave Credits" form (RS6221)

Upload Document

Close

Upload Document

Please choose a PDF for the you would like to upload

Document Type:

Browse...

Cancel

Save

Document Upload

Please use the 'Member Document Type' drop-down field to select the type of document you wish to upload. Please search your device for the file you wish to upload. Please Note: Only PDF files larger than 30 megabytes, please split the document into two or more uploads.

File Name

Add Attachment

*Select Employee NYSLRS ID Employee John Smith

Member Document Type System


*To receive this notification, and the corresponding letter, you will need to have the "Personnel" security role

<https://www.osc.state.ny.us/retire/forms/rs6221.pdf#search=%20RS6221>

Retirement Notice Email

- BCDS may trigger the following email to your employer to notify you of a retiring member. Please note that this email is not a Retirement Online notification; you will likely also receive a Retirement Online notification for the same member.

Notice of Retirement for John Smith

 [Member Support](#)
New York State Retirement System
Member Support

Dear Employer:

We have received notification that one of your employees has applied for retirement. To prevent processing delays, use the information included in this email to help you complete and upload the "Statement of Accrued Payments and Leave Credits" form (RS6221) as soon as possible.

Employee Information:
Employee: John Smith
NYSLRS ID: R123456789
SSN (Last four): XXXXX1234
Effective Date of Retirement: 06/01/2019
Member Registration Number: 123456789

Form RS6221 can be found at <http://www.osc.state.ny.us/retire/forms/rs6221.pdf>

[Statement of Accrued Payments and Leave Credits \(RS6221\)](#)

Statement of Accrued Payments and Leave Credits RS 6221 (Rev. 05/18) Received Date Pleasetype or printclearly in blue or blackink NYSLRS ID Social Security Number

www.osc.state.ny.us

To submit the completed form electronically, sign into Retirement Online Employer Portal and click on the "Upload a Member Document" link. If you have any questions, please email us at www.emailNYSLRS.com. You may also call our Retirement Online Employer Helpdesk Center at 1-844-616-9614.

Sincerely,
New York State and Local Retirement System

Notifications (Contribution Rates)

Notification Details

Description 00000: New Contribution Rates for Tier 6 members

New contribution rates for Tier 6 employees of 00000 have been updated. Please select the link below to review the changes.

[View Contribution Rates](#)

Remove Notification

Close

*Contribution rate change notifications are informational for State Employers – they are automatically loaded back into PayServ

Mandatory Contribution Rates

*As Of Date 04/01/2019

NYSLRS ID

First Name

Last Name

Tier 6

Location Code 00000

Retirement System

Search

Clear

Mandatory Contribution Details

Personalize | Find | View 100 | First 1-100 of 1068 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 00000	Smith, John A	R12345678	12345678	6	ERS	04/01/2019	3.50	Actual	09/08/2016	0	
2 00000	Johnson, Sally A	R87654321	87654321	6	ERS	04/01/2019	3.50	Actual	03/08/2017	0	

Enrollments

- All mandatory members hired in PayServ after April 3rd have been automatically enrolled. Employers can view those who have been enrolled by looking at the information on the Member Contribution Rates page.
- **If you mailed/faxed Mandatory member applications for those hired in PayServ between March 1st and April 3rd**
 - NYSLRS staff is in the process of reviewing these registrations to address Date of Membership inconsistencies.
 - You may navigate to the Member Contribution Rates page to determine if these members have been enrolled, but please note that their DOM may not be correct.
 - When finalized, the correct enrollment information and any corresponding deficiencies will automatically be passed back to PayServ.
- If you **already mailed/faxed Optional member applications to NYSLRS**, please do not enroll these optional members using Retirement Online.
 - If you have— this may result in erroneous dates of membership and/or contribution rates that will delay their proper completion.

Correspondence

- You will still receive correspondence from NYSLRS; however, we will be decreasing the volume of some correspondence, such as member enrollment information, as it is automatically applied in PayServ and is visible on the Member Contribution Rates pages.
 - This will help to minimize the scenarios where the same letter is being delivered to multiple individuals due to the way employer security is set up

Contact & Security Administrator Roles

Employer Contact Administrators

- Maintains employer contact information for individuals with whom NYSLRS communicates about topics including payroll, personnel, security, etc.
- Completes periodic reviews and updates to employer contacts. This includes adding new contacts, removing old contacts, and modifying the demographic information of existing contacts.
- Agencies using BSC will have one contact admin – BSC will have two contact admins

Employer Security Administrators

- 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.
- BSC will act as security admins for their clients.

Maintain Contact List

I want to...

- Make a Request
- Change My Password
- Manage My Security
- View My Scheduled
- Find Documents
- Upload a Member Document
- See NYSLRS News

Contact Summary Page

Contact Type	Name	Address	Phone	Email	
Billing	Mr WILLIAM THIEL			testingteammasked@osc.state.ny.us	Remove

Employer Contacts Edit

Contact

Employer 00000

Contact Type

Title BUSINESS MANAG

Prefix Ms

To update the Contact type or Report code, you must add a new contact and remove the existing contact if applicable.

*First Name Nme_person Middle Name

*Last Name 260328415 Suffix

To change the contact's name, please email the Employer Billing Unit at NYSLRS_billing@osc.state.ny.us

Contact Info

Phone & Email

*Phone Number 518/776-9743 Ext/PIN 9870

Alternate Phone Number Ext/PIN

Fax 518/123-4567 Ext/PIN 1234

Email testingteammasked@osc.state Alternate Email

Address

*Address 1 41 STATE ST *City ALBANY

Address 2 *State NY New York

Address 3 *Postal 12207-2843

For correct postal service formatting, please enter PO Box information under the street address. *Country United States

OK

Cancel

Employer Contacts

Employer 00000

Contact Summary Page

Contact Type	Name	Address	Phone	Email
	Ms Nme_person 260328415	BUS 41 S ALE		
Billing	Mr WILLIAM THIEL			testingteammasked@osc.state.ny.us
CEO	Mr GARY CERNE			
CFO	Mr WILLIAM THIEL			
Civil Service Administrator	Ms JULIE HEBNER			
Payroll	Ms TRACY SMITH-DENGLER			
Payroll (Alternate)	Mr WILLIAM THIEL			
Personnel	Ms JULIE HEBNER			testingteammasked@osc.state.ny.us

Back

Edit

mmasked@osc.state.ny.us [Remove](#)

mmasked@osc.state.ny.us [Remove](#)

mmasked@osc.state.ny.us [Remove](#)

mmasked@osc.state.ny.us [Remove](#)

mmasked@osc.state.ny.us [Remove](#)

[Remove](#)

mmasked@osc.state.ny.us [Remove](#)

ase email your request to quest."

[Remove](#)

Maintain Contact List



I want to...

[Make a Request](#)

[Change My Password](#)

[Manage My Security Profile](#)

[View My Scheduled Events](#)

[Find Documents](#)

[Upload a Member Document](#)

[See NYSLRS News](#)

[Manage Contact List](#)

[Manage Security Access](#)

[Submit Resolution For Official](#)

[Request Plan Upgrade](#)

[Update My Account Email](#)

[Submit Disability Application](#)

Employer Retirement Online Access

Employer 00000

User Access Summary

Name Mr DALE HUNNEYMAN

User ID DH08101970@EROL

Security Roles

Role Description	
1 Employer View	Remove Role
2 Personnel	Remove Role
3 Board Clerk	Remove Role
4 Employer Reporting Submitter	Remove Role
5 Employer Reporting Uploader	Remove Role
6 Security Administrator	Remove Role

[Add Security Role](#)

Name Ms JESSICA HUDON [Request User Access](#)

To remove a Contact Administrator, Security Administrator, or Security Administrator (Alt), please email your request to NYSLRS_Employer_Access@osc.state.ny.us with subject line "Contact / Security Administrator Removal Request."

Pending Changes

There are no Pending Changes.

[Back](#) [Save](#)

PayServ Updates

- When hiring OR maintaining employee records in PayServ, please check to make sure **all employees** have a valid SSN, Date of Birth and that their Retiree Indicator is properly populated.
- Invalid information may result in failure to properly enroll a mandatory member, or enrolling an ineligible member.

The screenshot displays the 'PayServ - The NYS Payroll System' interface. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Personal Information > Modify a Person. The 'Contact Information' tab is selected. The employee's name is SMITH, JOHN, with Person ID N01XXXXXX. The 'Name' section shows Effective Date: 01/01/1998, Format Type: English, and Display Name: JOHN SMITH. The 'Biographic Information' section includes Date of Birth: 10/06/1948 (69 Years 2 Months), Date of Death, Birth Country, Birth Location, and FAS Code. There are checkboxes for 'New York Retiree Indicator' and 'Waive Data Protection'. A 'Prior SSN' section is also visible.

Biographical Details	
SMITH, JOHN	Person ID: N01XXXXXX
Name	Find View All First 1 of 1 Last
Effective Date:	01/01/1998
Format Type:	English
Display Name:	JOHN SMITH
View Name	
Biographic Information	
Date of Birth:	10/06/1948 69 Years 2 Months
Date of Death:	
Birth Country:	
Birth Location:	
FAS Code	
<input type="checkbox"/> New York Retiree Indicator	
<input type="checkbox"/> Waive Data Protection	
Prior SSN	

Questions & Inquiries

- For any questions regarding the Contact and Security Admins:
 - Please contact the Employer Access team at [NYSLRS Employer Access@osc.state.ny.us](mailto:NYSLRS_Employer_Access@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**

The image features two stylized human silhouettes. The one on the left is a solid red color, and the one on the right is a light gray color. They are positioned as if in conversation, with their heads and shoulders facing each other. The background is plain white.

ANY QUESTIONS?

A stylized silhouette of a human figure in profile, facing right. The silhouette is composed of two overlapping shapes: a solid red one on the left and a lighter, semi-transparent grey one on the right. The word "APPENDIX" is centered in the lower half of the image.

APPENDIX

Retirement Online Employer Notifications

Description	Message
{Location Code}: Termination date for {NYSLRS ID} Requested	Please confirm that{Member Name}, {NYSLRS ID} has terminated their employment and you have taken final contributions.
{Location Code}: Annual Certification forms have been mailed for your review	Annual Certification forms are available for your review. Please return these forms once you have completed them.
{Location Code}: Start taking Service Credit deductions for {NYSLRS ID}	Take a %5 pre-tax deduction and %6 post-tax deduction (total %4) in %7 installments for {Member Name}, {NYSLRS ID}
{Location Code}: Take deduction for deficiency for {NYSLRS ID}.	Take a pre-tax deduction of {Deduction Amount} for the listed member on your next report.
{Location Code}: {NYSLRS ID} has reached the mandatory retirement age	{Member Name}, {NYSLRS ID} has reached the mandatory retirement age.
{Location Code}: The plan cost estimate requested is now available.	The plan cost estimate requested is now available in your documents folder.
{Location Code}: Termination date for {NYSLRS ID} Requested	Please confirm that{Member Name}, {NYSLRS ID} has terminated their employment and you have taken final contributions.
{Location Code}: The report you have uploaded has been posted.	The report you have uploaded has been posted. Select the link below to view the report summary and to view the actual payment amount owed for this report, net of available credits:
{Location Code}: Membership Form for {NYSLRS ID} Required	Please upload the signed membership form for {Member Name}, {NYSLRS ID} if you have not already done so. Failure to provide this form could result in termination of membership.
{Location Code}: Confirm Salary and Service for {NYSLRS ID}	Please upload the salary and certification form for {Member Name}, {NYSLRS ID}.
{Location Code}: New Contribution Rates for Tier 6 members	New contribution rates for Tier 6 employees of {Location Code} have been updated. Please select the link below to review the changes.
{Location Code}: Employees have reached their Cessation Dates.	The listed employees of {Location Code} have reached their Cessation Dates. They are no longer required to contribute.

Retirement Online Employer Notifications (Cont'd)

Description	Message
{Location Code}: Not Viewed: New Contribution Rates for Tier 6 members	New contribution rates for Tier 6 members of {Location Code}, and notification has not been viewed yet.
{Location Code}: {NYSLRS ID} has completed Tier Reinstatement process	{Member Name} has completed his/her Tier Reinstatement process in {Retirement System} Here are the member's new details: Tier: {Tier} Contribution Rate: {Contribution Rate}
{Location Code}: {Member Name} Invoices have been generated	The {Member Name} Invoice has been generated. Please select the link below to view the {Member Name} Invoice.
{Location Code}: {Member Name} Invoices have been generated and have not yet been viewed	The {Member Name} Invoice has been generated has not been viewed. Please select the link below to view the {Member Name} Invoice.
{Location Code}: Pensionable Earnings Details are on the Billing Dashboard	Please select the link below to view your current Pensionable Earnings Detail Report
{Location Code}: Pensionable Earnings Details are on the Billing.	The Pensionable Earnings Details Report is available on the Billing Dashboard and has not been viewed. Please select the link below to view the report.
{Location Code}: Your annual GASB Report is ready for your review	Your annual GASB report has been completed. Please select the link below to review the report.
{Location Code}: Stop taking Service Credit deductions for {NYSLRS ID}	Please stop Service Credit Purchase deductions for the listed member.
{Location Code}: Retirement Notice	{Member Name} has applied for retirement. Please go to the following link to upload the "Statement of Accrued Payments and Leave Credits" form (RS6221).

Retirement Online Employer Notifications (Cont'd)

Description	Message
{Location Code}: Confirm Salary and Service for {NYSLRS ID}	Please submit an adjustment report for {Member Name}, {NYSLRS ID}, {Member SSN} for the period between {Start Date} and {End Date}. If you need further information to identify this employee, please contact us.
{Location Code}: 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.
{Location Code}: New Loan/SCP Deduction	There are new updates to employee loan and/or service credit purchase deductions. Please select the link below to review and update these deductions.