

# Retirement Online

## Retirement Online Practice Scenarios for Local Employers

Want to make sure you're ready to use *Retirement Online* for reporting and enrollment? These practice scenarios will put you on the right track for success when we go live in May.

If you encounter issues or have questions, call the Retirement Online Employer Help Desk at 844-619-9614 for help or to enroll in a practice session.

For more information and additional resources, visit our **Retirement Online webpage for employers**.

### Scenario 1: Sign in to the *Retirement Online* Training Environment

1. Access the ***Retirement Online*** training environment.
2. Sign in using your regular *Retirement Online* employer credentials (ending in @EROL)
  - a. NOTE: If you are asked to set security questions in the training environment, it means you haven't set up your employer account in *Retirement Online*. Remember to sign in to ***Retirement Online*** and set up your employer account so you're ready to report and enroll members in May.

### Scenario 2: Submit an Employer Report

*(For contacts with Employer Reporting Uploader or Employer Reporting Submitter security roles)*

1. Navigate to the Employer Reporting Dashboard page and submit an employer report for November 2018, December 2018, or January 2019.
2. Resolve any errors or warnings you may receive in your report:
  - a. File Level Errors, such as invalid row formats?
    - i. Open your file and make sure the format meets NYSLRS requirements.
  - b. Errors/warnings regarding members not being enrolled/active at your location?
    - i. Navigate to the Member Contribution Rates page. Check that the member is enrolled at your location and that their information is correctly populated in the report. If the member is not enrolled at your location, use the Enrollment Dashboard to enroll them.
  - c. Warnings regarding contribution amounts?
    - i. **DO NOT CHANGE THE REPORT**. Validate that the contribution value in the report for the member is actually what you withheld. Only change the contribution amount in the report if it does not match what was actually withheld.

- ii. After submitting the report, navigate to the Member Contribution Rates page in the employer reporting dashboard and view the correct contribution rate for the member. Starting in May, you would use this value to update your payroll system.
  - iii. Once you have updated your payroll system, navigate to the Improper Withholdings page to determine the amount over/under withheld. If you over withheld, NYSLRS will not accept this money and you will be responsible for refunding to the member.
- d. Warnings regarding service credit purchase/loan deductions?
- i. **DO NOT CHANGE THE REPORT.** Validate that the deduction value(s) in the report for the member are actually what you withheld. Only change the deduction amount in the report if it does not match what was actually withheld.
  - ii. After submitting the report, navigate to the Improper Withholdings page for the report and determine the amount that was over/under deducted. Starting in May, you would use this value to update your payroll system. If you over deducted, NYSLRS will not accept this money and you will be responsible for refunding to the member.
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### Scenario 3: Submit an Adjustment Report

1. Navigate to the Employer Reporting Dashboard page and submit an adjustment report for a report date in the past. An adjustment report can only be filed to correct data previously reported. Remember, no contributions will be accepted with an adjustment report.
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### Scenario 4: Enroll a Member

*(For contacts with Personnel security role)*

1. Navigate to the Member Enrollment Dashboard page and enroll a member.
  - a. NOTE: If they are an optional member, remember to upload the supplied Practice Membership form.
2. Record the membership information displayed in the pop-up at the end of the enrollment process. If you need to see this information again, navigate to the Member Contribution Rates page to look at the member's registration number, NYSLRS ID, tier, and contribution rate. Update your payroll system to include the new enrollment information for your members.