# Employer Security Roles in *Retirement Online* for Local Employers

This table highlights the portal notifications that individuals in *Retirement Online* security roles can receive. A portal notification is a message that appears on the portal home page for those individuals that are designated with the security role. These notifications may include a textual message as well as a link to perform an action. Therefore, it is crucial to have an individual designated for each security role to receive the various portal notifications pushed out by NYSLRS. **Notifications that are sent as letters have been indicated with (Letter) in the table** (if there is also a plus sign, a letter is sent in addition to a notification). For any additional questions surrounding these security roles and notifications, please contact the Retirement Online Help Desk by email at RetirementHelpDesk@osc.state.ny.us or by phone at (844) 619-9614.

| Role Title | Required? | Role Description | Informational Notifications | Action-Based Notifications |
|---|---|---|---|---|
| **Employer Reporting Uploader** | Yes | • Accesses the File Upload Page and clicks the "Initiate Report" button to initiate the employer report (regular or adjustment); or can create a manual report<br>• Views error and warnings messages related to the uploaded report – some will require action to be completed by the Employer Reporting Submitter<br>• Views data in the initiated report and historical reporting data<br>• Cannot edit data or certify the report<br>• ***Note:*** *One person can have both this role and the Employer Reporting Submitter role (see below). If your staff completes all transactions for the Employer Reporting process, they should be granted both of these roles.* | • Notification that this user is now able to submit a report | • Not applicable[4] |

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|---|---|---|---|---|
| **Employer Reporting Submitter** | Yes | • Edits employer reporting data prior to clicking the "Submit" (ie. Approve) button to resolve error and warning messages<br>• Ability to delete employer reports prior to submission<br>• Submits (ie. Approves) the employer report<br>• Views and downloads the "Improper Withholdings" page for their employees<br>• ***Note:*** *One person can have both this role and the Employer Reporting Uploader role (see above). If your staff completes all transactions for the Employer Reporting process, they should be granted both of these roles.* | • Notification that reports submitted by this user with the Employer Reporting Submitter role have been posted<br>• Final loan deduction for a member (**Letter**)[2] | • Request for Salary and Service Certification forms on behalf of a member[2]<br>• Previously requested termination date of a member<br>• Notification stop loan deductions for a member (+**Letter**)[2]<br>• Notification to change loan deductions for a member (+**Letter**)[2] |
| **Payroll** | Yes | • Receives requests to change/ maintain payroll deductions owed to NYSLRS<br>• Accesses the listing of all contribution rates for employees for a Location Code and the effective date of any contribution rate changes<br>• Views reported earnings and service for current and prior fiscal years | • Employee that has reached their cessation date<br>• Final loan deduction for a member (**Letter**)[2]<br>• New contribution rates for a Tier 6 member[3]<br>• Member has completed their tier reinstatement[3]<br>• Transfer-in confirmation for a member (+**Letter**)[3]<br>• Mandatory retirement notice for a member (+**Letter**)[3]<br>• Service Retirement or Disability Retirement notice for a member (+**Letter**) | • Notification to stop taking service credit purchase deductions for a member<br>• Notification to change service credit purchase deductions for a member<br>• Notification to stop loan deductions for a member (+**Letter**)[2]<br>• Notification to change loan deductions for a member (+**Letter**)[2]<br>• Request for Salary and Service Certification forms on behalf of a member[2] |

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|---|---|---|---|---|
| **Personnel** | Yes | • Accesses the Enroll a Member functionality and completes enrollment for employees under their Location Code<br>• Receives confirmation of the member's NYSLRS ID, Registration Number, Employment Instance, Tier, and Contribution Rate upon successful submission<br>• Uploads Optional Enrollment forms | • Service Retirement or Disability Retirement notice for a member (+**Letter**)<br>• New contribution rates for a Tier 6 member[3]<br>• Member has completed their tier reinstatement[3]<br>• Transfer-in confirmation for a member (+**Letter**)[3] | • Membership form for a member is required<br>• Notification of option to terminate a not-recently reported employee |
| **Board Clerk** | Yes | • Adds and updates Elected and Appointed Official Resolution information electronically<br>• Receives final confirmation that the information was submitted successfully and information on how to report the official<br>• Receives final confirmation that the form was submitted successfully or if there was an error. | • Not applicable[4] | • Not applicable[4] |
| **Contact Administrator** | Yes | • Maintains employer contact information for individuals with whom NYSLRS communicates about topics including payroll, billing, personnel, security, etc.<br>• Completes periodic reviews and updates to employer contacts. This includes adding new contacts, removing old contacts, and modifying the demographic information of existing contacts.<br>• ***Note:*** *Member invoices, billing dashboard, plan cost notifications will not be sent until 2020.* | • Service Retirement or Disability Retirement notice for a member (+**Letter**)<br>• New contribution rates for a Tier 6 member[1]<br>• Notification that member invoices have been generated[1]<br>• Pensionable earnings details are available on the Billing Dashboard[1]<br>• Requested plan cost estimate is available for viewing[1] | • Not applicable |

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|---|---|---|---|---|
| **Security Administrator** | Yes | • Requests *Retirement Online* system access for their location code for users who need it to do business with NYSLRS.<br>• Monitors for fraud or suspicious activity.<br>• Reports unusual activity to NYSLRS for follow up.<br>• Removes access when necessary.<br>• Works with Contact Administrator to confirm that roles are properly assigned and fully staffed. | • Not applicable[4] | • Not applicable[4] |
| **Employer Billing** | Yes | • Accesses the Employer Billing dashboard to view the location's estimated, projected and annual invoices<br>• Reviews employee fiscal year and pre-billed fiscal year earnings<br>• Views prior years' adjustments (PYAs)<br>• Accesses Governmental Accounting Standards Board (GASB) information<br>• Views payment history | • Your invoice has been generated and can be viewed in Retirement Online<br>• Pensionable earnings details are available on the Billing Dashboard<br>• Your GASB statement is available to view in Retirement Online | • Not applicable |

[1] The Contact Administrator will only receive these notifications if they have not been opened by intended audience. They will work with the Security Administrator to follow up accordingly.

[2] This notification goes to both the Employer Reporting Submitter and Payroll roles.

[3] This notification goes to both the Payroll and Personnel roles.

[4] These roles do not receive any electronic notifications, but they can potentially receive print letters.