Removing and Adding an Employer Contact Using Retirement Online

NYSLRS
New York State and Local Retirement System

This quick guide shows you (as a Contact Administrator) how to remove and add an employer contact using *Retirement Online*. This request may need to be reviewed and approved by the Member & Employer Services Bureau before the change is implemented.

To add and/or remove a non-Payroll employer contact, complete Steps 1 – 33.

To add and/or remove a Payroll employer contact, you must first add a new Payroll employer contact, then remove the previous one. There must always be a Payroll contact in the system, so it will not allow you to remove a Payroll contact first. To complete the Steps required, complete Steps 1 – 3, then proceed to Steps 34 – 67.

When you remove an employee from your NYSLRS Employer Contact list, it only removes them as a contact. It does not remove the employee's NYSLRS membership, nor does it make them inactive under your location code. If the employee has left your location, the Security Administrator must remove all security roles associated with the employee prior to you removing them as a contact.

It is important to keep your employer contacts up to date so the appropriate employees receive employer-specific information from NYSLRS without delay.

If you need to request access or assign security roles for a Security Administrator or Contact Administrator, you must submit a new Security Administrator or Contact Administrator form completed and signed by your CEO or CFO to NYSLRS. For more information, please visit the Contact and Security Administrator Roles page.

Step	Action
1	On your *Retirement Online Account Homepage*, in the 'I want to…' section, click the **Manage Contact List** link. Manage Contact List
2	The *Employer List* page will appear. Click the **Employer** link of the employer contact you are adding. 40399 VILLAGE OF WATERFORD **Note:** You may have more than one employer location listed if you work for multiple employers.
3	The *Contact Summary* page will appear. If necessary, **scroll down** until you see the **Edit** button. Click the **Edit** button. Edit **To update the Payroll Contact, skip to Step 34.** To update a contact other than Payroll, continue to Step 4.
4	If you need to remove an employer contact, you will click the **Remove** button next to the employer contact you are removing prior to clicking **Save**. If the employee has left your location, the Security Administrator must remove all security roles associated with the employee prior to you removing them as a contact. To remove a non-Payroll contact, click the **Remove** button next to the employer contact you are removing. Remove
5	A 'Message' pop-up will appear to confirm that you wish to remove the employer contact. Click the **Yes** to continue. Yes

Step	Action
6	Click the **Save** button. Save **Note:** Your changes will not take effect until you click **Save**.
7	A 'Message' pop-up will appear indicating that the changes have been saved. If any of your changes are in the Pending Changes panel, they will require approval from NYSLRS before they take effect. Click the **OK** to continue. OK
8	To add a new contact, click the **Add New Contact** button. Add New Contact
9	A 'Message' pop-up will appear asking if the employer contact you are adding is a member of NYSLRS. **Note:** Both paths will direct you to the *Employer Contact Person Search* page. If the person is member of NYSLRS, you will be required to complete Steps 10 – 14. If they are not, please proceed to Step 16.
10	The *Employer Contact Person Search* page will appear. Select the **Employee ID** drop-down field to select an ID type. **Note:** If the person is a member of NYSLRS, the **Skip Person Search** button will be grayed out and disabled. If the person is not a member of NYSLRS, proceed to Step 16.
11	Click in the **NYSLRS ID** field and enter the employer contact's NYSLRS ID.
12	Use the drop-down to select the employer contact's **Month of Birth**.
13	Click in the **Home Address Zip Code** field and enter the employer contact's home address zip code.
14	Once you have completed the required fields, click the **Person Search** button. Person Search
15	If the information entered does not match NYSLRS records, a 'Message' pop-up will appear. Click **OK** to continue. OK **Note:** If the information is a match, you will not see this pop-up message. Proceed to Step 18.
16	This brings you back to the *Employer Contact Person Search* page. Click the **Skip Person Search** button. Skip Person Search
17	If you skip person search, a 'Message' pop-up will appear stating that your request will require further processing by the Member & Employer Services Bureau. To proceed without searching, click the **Yes** button to continue. Yes

Step	Action
18	The *Contact Add* page will appear. Under the 'Contact' section, use the drop-down field to select the **Contact Type**.
19	If the employee has a specific job title, you may enter it into the **Title** field. This is optional and not a required field.
20	Use the drop-down field to select the employer contact's **Prefix**. **Note:** If you located the person and did not skip person search, the person's name will auto populate. The following fields will be grayed out and not editable: Prefix, First Name, Middle Name, Last Name, and Suffix. Proceed to Step 23.
21	Click in the **First Name** field and enter the employer contact's first name.
22	Click in the **Last Name** field and enter the employer contact's last name.
23	Under the 'Contact Info – Phone & Email' section, click in the **Phone Number** field and enter the employer contact's business phone number. When entering the employer contact's phone number, please do not include any parentheses [()], dashes [-], or slashes [/]. This field will format the phone number automatically after you select a different text box. **Note:** If the employer contact has an extension or PIN, click in the **Ext/PIN** field and enter the extension or PIN.
24	If applicable, click in the **Fax** field and enter the employer contact's fax number. When entering the fax number, please do not include any parentheses [()], dashes [-], or slashes [/]. This field will format the fax number automatically after you click a different text box.
25	Click in the **Address 1** field and enter the employer contact's address. **Note:** If applicable, enter any additional information into the **Address 2** and **Address 3** fields.
26	Click in the **City** field and enter the employer contact's city.
27	Click in the **State** field and enter the employer contact's state. **Note:** You can use the look-up icon next to the **State** field to view a list of states, or you can type in the two-letter state abbreviation.
28	Click in the **Postal** field and enter the employer contact's ZIP code. **Note:** Within *Retirement Online*, Postal refers to ZIP code for US addresses.
29	Click in the **Email** field and enter the employer contact's business email.

Step	Action
30	Once all the employee's information is entered, click the **Add** button. Add
31	A *Message* page will appear. It will present the address in the format used by the United States Postal Service (USPS) for your approval. If you click **Yes**, *Retirement Online* will update the address to the suggested USPS version. If you click **No**, the address will stay as entered. Either selection will bring you to the next step. Yes
32	A 'Message' pop-up will appear stating that the changes will not be saved until the **Save** button is clicked on the *Manage Employer Contacts* page. To continue, click the **OK** button. OK
33	Click the **Save** button. Save
34	**Scroll down** until you see the **Add New Contact** button.
35	To add a new contact, click the Add New Contact button. Add New Contact
36	A 'Message' pop-up will appear asking if the employer contact you are adding is a member of NYSLRS. **Note:** Both paths will direct you to the *Employer Contact Person Search* page. If the person is member of NYSLRS, you will be required to complete Steps 38 – 42. If the person is not a member of NYSLRS, proceed to Step 43.
37	The *Employer Contact Person Search* page will appear. Select the **Employee ID** drop-down field to select an ID type. **Note:** If the person is a member of NYSLRS, the **Skip Person Search** button will be grayed out and disabled. If the person is not a member of NYSLRS, proceed to Step 43.
38	Click in the **NYSLRS ID** field and enter the employer contact's NYSLRS ID.
39	Use the drop-down to select the employer contact's **Month of Birth**.
40	Click in the **Home Address Zip Code** field and enter the employer contact's home address zip code.
41	Once you have completed the required fields, click the **Person Search** button. Person Search
42	If the information entered does not match NYSLRS records, a 'Message' pop-up will appear. Click **OK** to continue. OK **Note:** If the information is a match, you will not see this pop-up message and will proceed to Step 45.

Step	Action
43	This brings you back to the *Employer Contact Person Search* page. Click the **Skip Person Search** button. Skip Person Search
44	If you skip person search, a 'Message' pop-up will appear stating that your request will require further processing by the Member & Employer Services Bureau. To proceed without searching, click the **Yes** button to continue. Yes
45	The *Contact Add* page will appear. Under the 'Contact' section, use the drop-down field to select the **Contact Type**.
46	If the employee has a specific job title, you may enter it into the **Title** field. This is optional and not a required field.
47	Use the drop-down field to select the employer contact's **Prefix**. **Note:** If you were able to locate your person and did not skip person search, the person's name will auto populate. The following fields will be grayed out and not editable: Prefix, First Name, Middle Name, Last Name, and Suffix. Proceed to Step 50.
48	Click in the **First Name** field and enter the employer contact's first name.
49	Click in the **Last Name** field and enter the employer contact's last name.
50	Under the 'Contact Info – Phone & Email' section, click in the **Phone Number** field and enter the employer contact's business phone number. When entering the employer contact's phone number, please do not include any parentheses [()], dashes [-], or slashes [/]. This field will format the phone number automatically after you select a different text box. **Note:** If the employer contact has an extension or PIN, click in the **Ext/PIN** field and enter the extension or PIN.
51	If applicable, click in the **Fax** field and enter the employer contact's fax number. When entering the fax number, please do not include any parentheses [()], dashes [-], or slashes [/]. This field will format the fax number automatically after you click a different text box.
52	Click in the **Address 1** field and enter the employer contact's address. **Note:** If applicable, enter any additional information into the **Address 2** and **Address 3** fields.
53	Click in the **City** field and enter the employer contact's city.

Step	Action
54	Click in the **State** field and enter the employer contact's state. **Note:** You can use the look-up icon next to the **State** field to view a list of states, or you can type in the two-letter state abbreviation.
55	Click in the **Postal** field and enter the employer contact's ZIP code. **Note:** Within *Retirement Online*, Postal refers to ZIP code for US addresses.
56	Click in the **Email** field and enter the employer contact's business email.
57	Once all the employee's information is entered, click the **Add** button. Add
58	A *Message* page will appear. It will present the address in the format used by the United States Postal Service (USPS) for your approval. If you click **Yes**, *Retirement Online* will update the address to the suggested USPS version. If you click **No**, the address will stay as entered. Either selection will bring you to the next step. Yes
59	A 'Message' pop-up will appear stating that the changes will not be saved until the **Save** button is clicked on the *Manage Employer Contacts* page. To continue, click the **OK** button. OK
60	The *Employer Contacts* page will appear. If you skipped the person search, the request to add the employer contact will appear with the Change Type designation of "Addition" in your 'Pending Changes' section. This request will need to be reviewed and approved by NYSLRS before the changes are finalized. **Note:** If you were able to locate your person in Steps 38 – 41, they will not appear in the 'Pending Changes' section.
61	To remove the outdated Payroll contact, you will click the **Remove** button next to the employer contact you are removing prior to clicking **Save**. Remove **Note:** If the employee has left your location, the Security Administrator must remove all security roles associated with the employee prior to you removing them as a contact.
62	Click the **Save** button. Save **Note:** Your changes will not take effect until you click **Save**.
63	A 'Message' pop-up will appear to confirm that you wish to remove the employer contact. Click the **Yes** to continue. Yes
64	If necessary, **scroll down** until you see the **Save** button. Click the **Save** button. Save
65	A 'Message' pop-up will appear to inform you that your changes have been saved and may need NYSLRS' approval. If you located the member in Steps 37 – 41 and did not skip person search, you will not see this pop-up message. Click the **OK** button. OK