

Removing and Adding an Employer Contact Using Retirement Online

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.





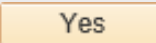
To add and/or remove a non-Payroll employer contact, complete Steps 1 – 33.


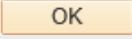









To add and/or remove a Payroll employer contact, you must first add a new Payroll employer contact, then remove the previous one. There must always be a Payroll contact in the system, so it will not allow you to remove a Payroll contact first. To complete the Steps required, complete Steps 1 – 3, then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


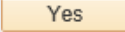









It is important to keep your employer contacts up to date so the appropriate employees receive employer-specific information from NYSLRS without delay.

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 <i>Retirement Online Account Homepage</i> , in the ‘I want to...’ section, click the Manage Contact List link. 
2	The <i>Employer List</i> page will appear. Click the Employer link of the employer contact you are adding.  Note: You may have more than one employer location listed if you work for multiple employers.
3	The <i>Contact Summary</i> page will appear. If necessary, scroll down until you see the Edit button. Click the Edit button.  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. 
5	A ‘Message’ pop-up will appear to confirm that you wish to remove the employer contact. Click the Yes to continue. 

Step	Action
6	Click the Save button.  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. 
8	To add a new contact, click the Add New Contact button. 
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 <i>Employer Contact Person Search</i> 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 <i>Employer Contact Person Search</i> 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. 
15	If the information entered does not match NYSLRS records, a 'Message' pop-up will appear. Click OK to continue.  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 <i>Employer Contact Person Search</i> page. Click the Skip Person Search button. 
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. 

Step	Action
18	The <i>Contact Add</i> page will appear. Under the 'Contact' section, use the drop-down field to select the Contact Type . <input type="text"/>
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. <input type="text"/>
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. <input type="text"/>
22	Click in the Last Name field and enter the employer contact's last name. <input type="text"/>
23	Under the 'Contact Info – Phone & Email' section, click in the Phone Number field and enter the employer contact's business phone number. <input type="text"/> 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. <input type="text"/> 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. <input type="text"/> 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. <input type="text"/>
27	Click in the State field and enter the employer contact's state. <input type="text"/> 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. <input type="text"/> Note: Within <i>Retirement Online</i> , Postal refers to ZIP code for US addresses.
29	Click in the Email field and enter the employer contact's business email. <input type="text"/>

Step	Action
30	Once all the employee's information is entered, click the Add button. 
31	A <i>Message</i> 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 , <i>Retirement Online</i> 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. 
32	A 'Message' pop-up will appear stating that the changes will not be saved until the Save button is clicked on the <i>Manage Employer Contacts</i> page. To continue, click the OK button. 
33	Click the Save button. 
34	Scroll down until you see the Add New Contact button.
35	To add a new contact, click the Add New Contact button. 
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 <i>Employer Contact Person Search</i> 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 <i>Employer Contact Person Search</i> 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. 
42	If the information entered does not match NYSLRS records, a 'Message' pop-up will appear. Click OK to continue.  Note: If the information is a match, you will not see this pop-up message and will proceed to Step 45.

Step	Action
43	<p>This brings you back to the <i>Employer Contact Person Search</i> page.</p> <p>Click the Skip Person Search button. <input type="button" value="Skip Person Search"/></p>
44	<p>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. <input type="button" value="Yes"/></p>
45	<p>The <i>Contact Add</i> page will appear. Under the 'Contact' section, use the drop-down field to select the Contact Type. <input type="text"/></p>
46	<p>If the employee has a specific job title, you may enter it into the Title field. This is optional and not a required field. <input type="text"/></p>
47	<p>Use the drop-down field to select the employer contact's Prefix.</p> <p>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.</p>
48	<p>Click in the First Name field and enter the employer contact's first name. <input type="text"/></p>
49	<p>Click in the Last Name field and enter the employer contact's last name. <input type="text"/></p>
50	<p>Under the 'Contact Info – Phone & Email' section, click in the Phone Number field and enter the employer contact's business phone number. <input type="text"/></p> <p>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.</p> <p>Note: If the employer contact has an extension or PIN, click in the Ext/PIN field and enter the extension or PIN.</p>
51	<p>If applicable, click in the Fax field and enter the employer contact's fax number. <input type="text"/></p> <p>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.</p>
52	<p>Click in the Address 1 field and enter the employer contact's address. <input type="text"/></p> <p>Note: If applicable, enter any additional information into the Address 2 and Address 3 fields.</p>
53	<p>Click in the City field and enter the employer contact's city. <input type="text"/></p>

Step	Action
54	<p>Click in the State field and enter the employer contact's state. <input type="text"/></p> <p>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.</p>
55	<p>Click in the Postal field and enter the employer contact's ZIP code. <input type="text"/></p> <p>Note: Within <i>Retirement Online</i>, Postal refers to ZIP code for US addresses.</p>
56	<p>Click in the Email field and enter the employer contact's business email. <input type="text"/></p>
57	<p>Once all the employee's information is entered, click the Add button. <input type="button" value="Add"/></p>
58	<p>A <i>Message</i> 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, <i>Retirement Online</i> 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. <input type="button" value="Yes"/></p>
59	<p>A 'Message' pop-up will appear stating that the changes will not be saved until the Save button is clicked on the <i>Manage Employer Contacts</i> page. To continue, click the OK button. <input type="button" value="OK"/></p>
60	<p>The <i>Employer Contacts</i> 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.</p> <p>Note: If you were able to locate your person in Steps 38 – 41, they will not appear in the 'Pending Changes' section.</p>
61	<p>To remove the outdated Payroll contact, you will click the Remove button next to the employer contact you are removing prior to clicking Save. <input type="button" value="Remove"/></p> <p>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.</p>
62	<p>Click the Save button. <input type="button" value="Save"/></p> <p>Note: Your changes will not take effect until you click Save.</p>
63	<p>A 'Message' pop-up will appear to confirm that you wish to remove the employer contact. Click the Yes to continue. <input type="button" value="Yes"/></p>
64	<p>If necessary, scroll down until you see the Save button. Click the Save button. <input type="button" value="Save"/></p>
65	<p>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. <input type="button" value="OK"/></p>