

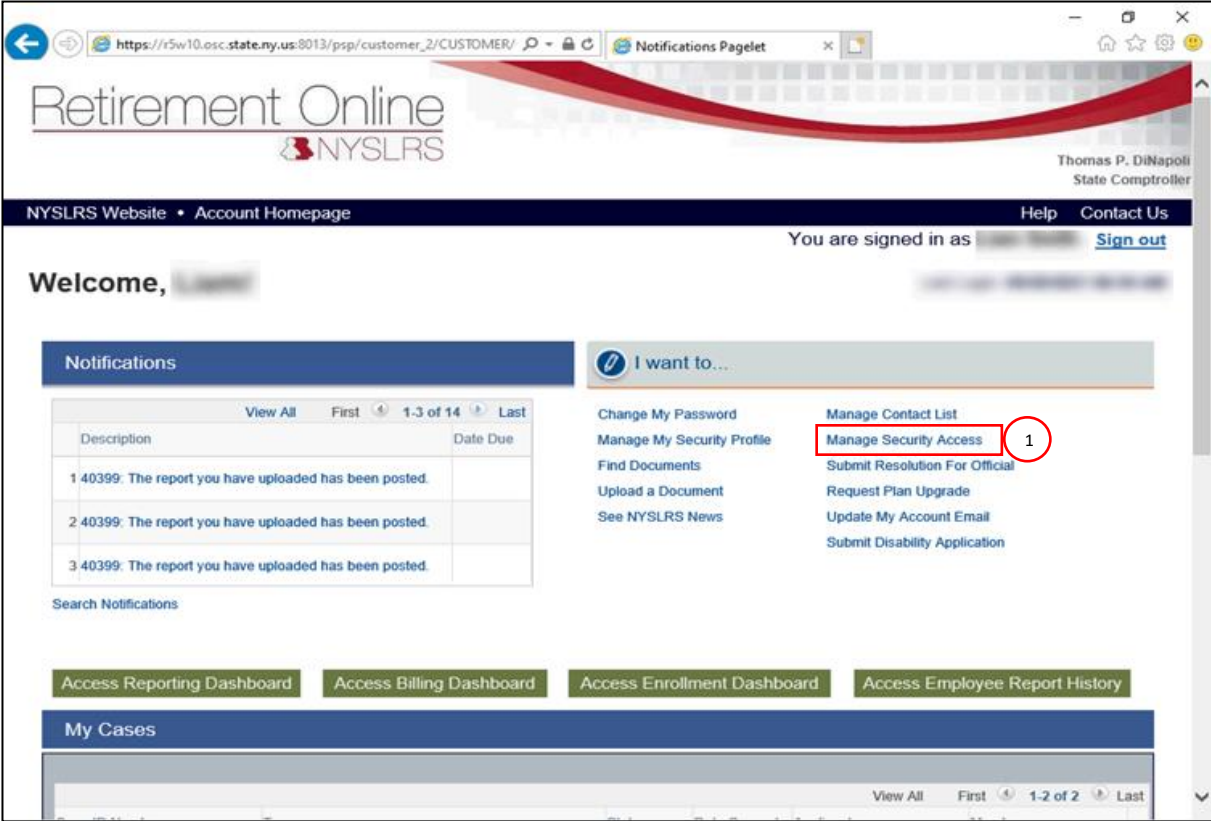


Request Access and Assign Security Roles to Retirement Online

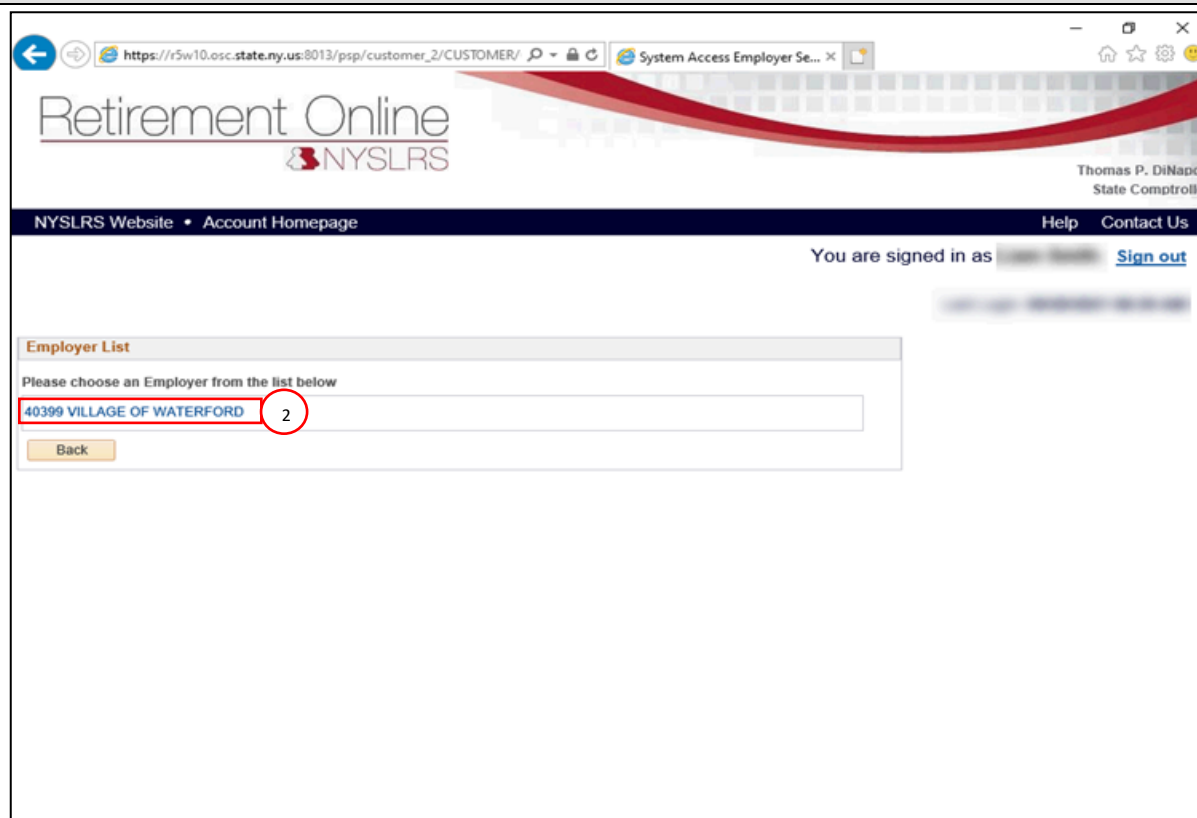
This simulation shows you (as an employer security administrator) how to request access and assign security roles for an employer contact who does not have access to *Retirement Online*. Before requesting access for a contact, make sure your employer contact administrator has added them as an employer contact. They are the only individuals allowed to add employer contacts.

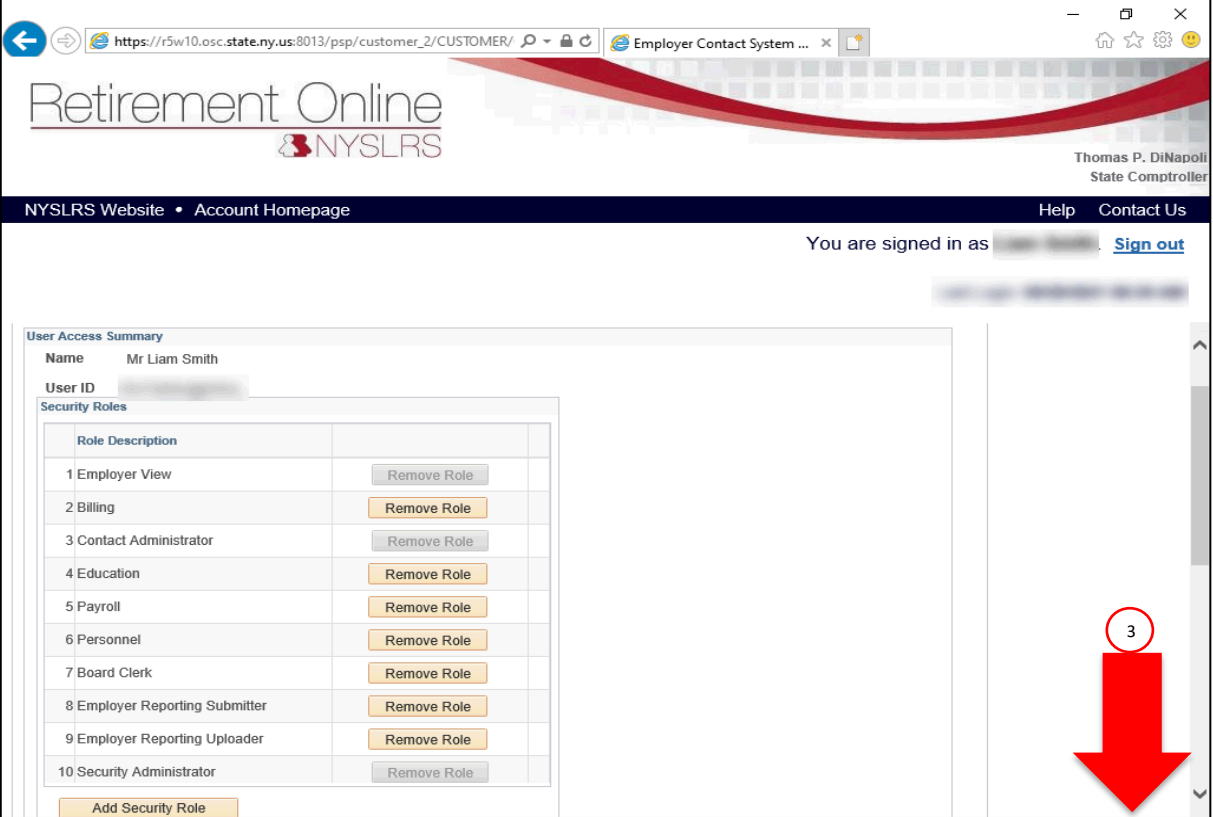
Once the employer contact is added by the Contact Administrator, only then can you (as an employer security administrator) request access and security roles. Once access has been granted, the employer contact will receive their log-in credentials for Retirement Online.

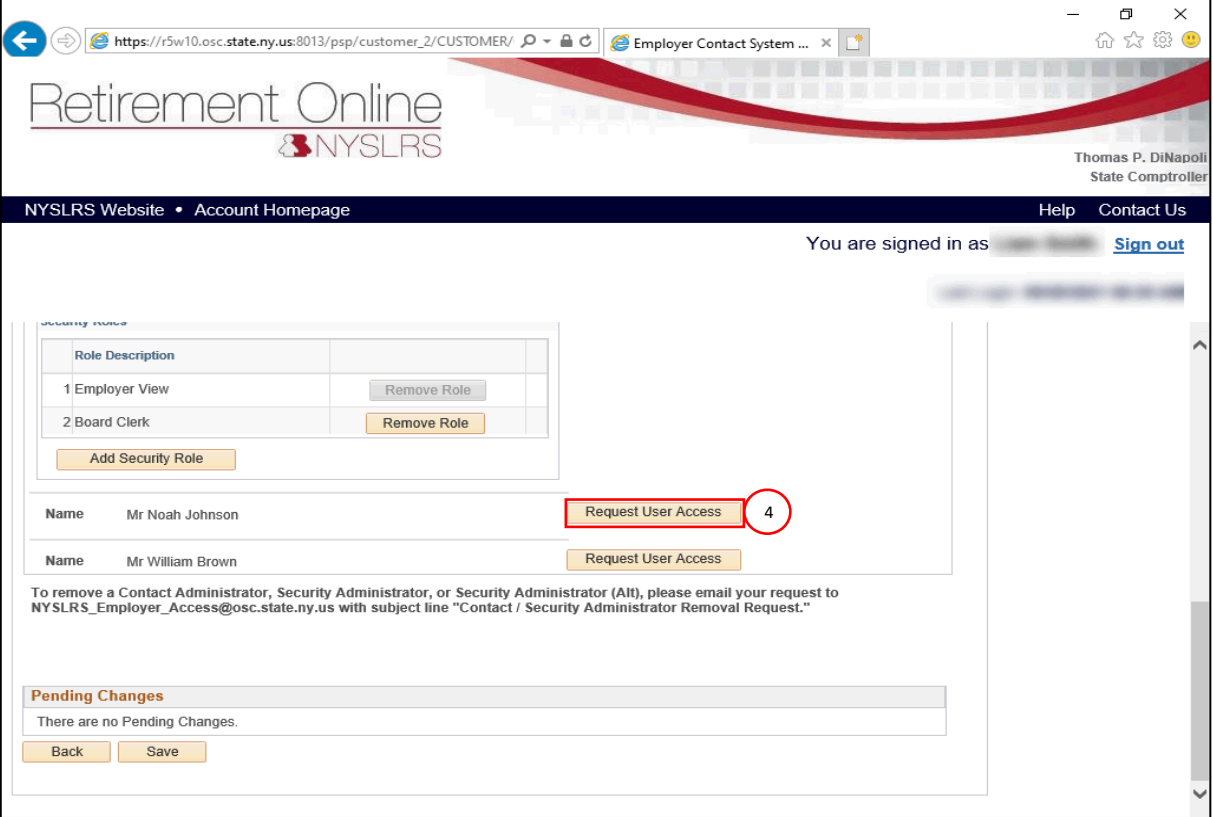
If you need to request access or assign security roles for a Security Administrator or Contact Administrator, you must submit the necessary form completed and signed by your CEO or CFO to NYSLRS. For more information, please visit the [Contact and Security Administrator Roles](#) page.

Step	Action
<p>1.</p>	<p>On your <i>Retirement Online Account Homepage</i>, in the 'I want to...' section, click the Manage Security Access link.</p> <div data-bbox="275 397 541 435" style="border: 1px solid black; padding: 2px; margin: 10px 0;">Manage Security Access</div>  <p>The screenshot shows the Retirement Online Account Homepage. The browser address bar displays the URL: https://r5w10.osc.state.ny.us:8013/psp/customer_2/CUSTOMER/. The page header includes the Retirement Online logo and the text 'Thomas P. DiNapoli State Comptroller'. The main navigation bar shows 'NYSLRS Website • Account Homepage' and 'You are signed in as [Name] Sign out'. The 'I want to...' section contains a list of links, with 'Manage Security Access' highlighted by a red box and a circled '1'. Other links in this section include 'Change My Password', 'Manage My Security Profile', 'Find Documents', 'Upload a Document', 'See NYSLRS News', 'Manage Contact List', 'Submit Resolution For Official', 'Request Plan Upgrade', 'Update My Account Email', and 'Submit Disability Application'. The 'Notifications' section on the left shows a table with three entries, all stating 'The report you have uploaded has been posted.' The 'My Cases' section at the bottom is currently empty.</p>

Step	Action
<p>2.</p>	<p>The <i>Employer List</i> page will appear.</p> <p>Note: You may have more than one employer location listed if you work for multiple employers.</p> <p>Click the link for the Employer of the employer contact for whom you are requesting access.</p> <p>40399 VILLAGE OF WATERFORD</p>



Step	Action
<p>3.</p>	<p>The <i>Employer Retirement Online Access</i> page will appear.</p> <p>Scroll down until you can see the Request User Access button under the 'User Access Summary' section.</p> 

Step	Action
4.	<p>Under the 'User Access Summary' section, click the Request User Access button.</p>  <p>The screenshot shows the Retirement Online NYSLRS Account Homepage. The user is signed in as Mr Noah Johnson. Under the 'User Access Summary' section, there is a table with two rows: '1 Employer View' and '2 Board Clerk'. Each row has a 'Remove Role' button. Below the table is an 'Add Security Role' button. Below the 'Add Security Role' button, there are two rows of user information. The first row shows 'Name Mr Noah Johnson' and a 'Request User Access' button, which is circled in red. The second row shows 'Name Mr William Brown' and a 'Request User Access' button. Below the user information, there is a message: '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."'.</p>

Step	Action
<p>5.</p>	<p>The <i>Employer Contact Person Search</i> page will appear.</p> <p>If you have the employer contact's information, select an ID type from the drop-down, then complete steps 6 – 11.</p> <p>Registration Number ▼</p> <p>If you do not have the employer contact's information, proceed to Step 12.</p>

Retirement Online
NYSLRS

Thomas P. DiNapoli
State Comptroller

NYSLRS Website • Account Homepage Help Contact Us

You are signed in as [Name] [Sign out](#)

Employer Contact Person Search

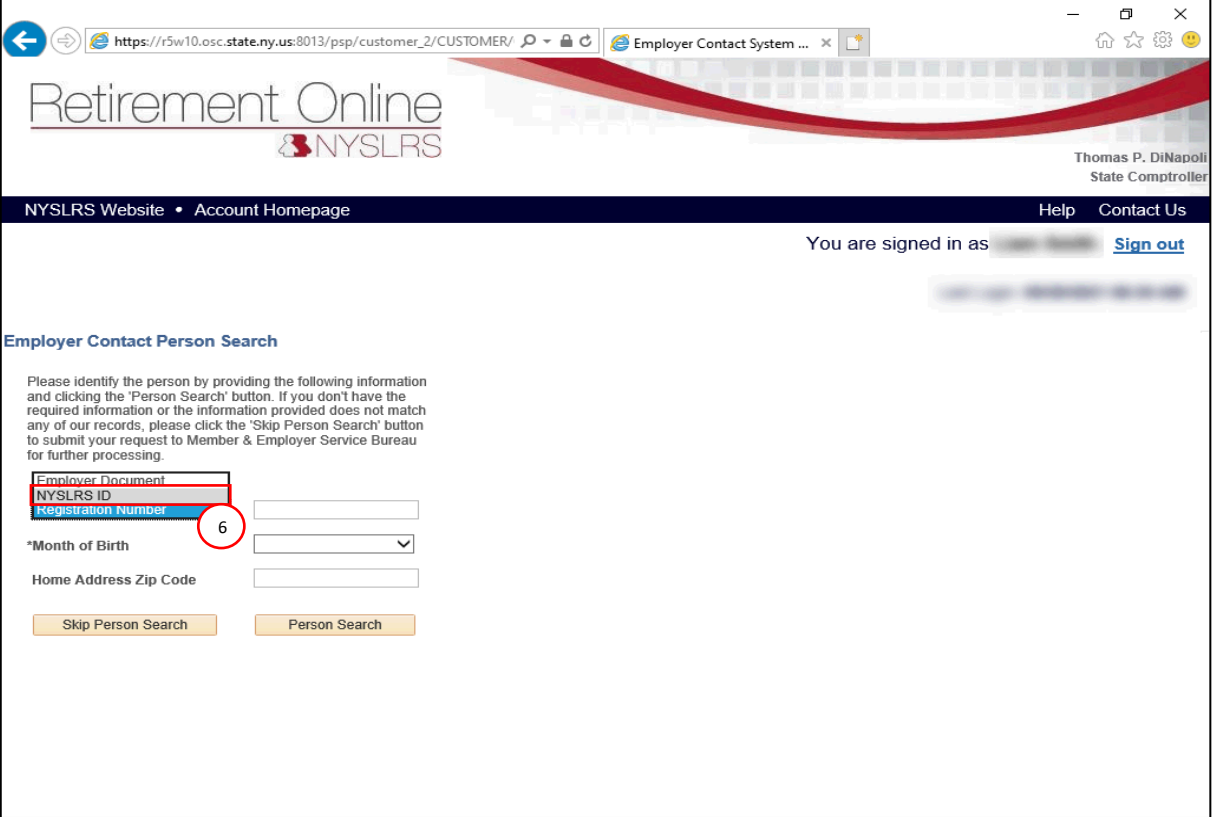
Please identify the person by providing the following information and clicking the 'Person Search' button. If you don't have the required information or the information provided does not match any of our records, please click the 'Skip Person Search' button to submit your request to Member & Employer Service Bureau for further processing.

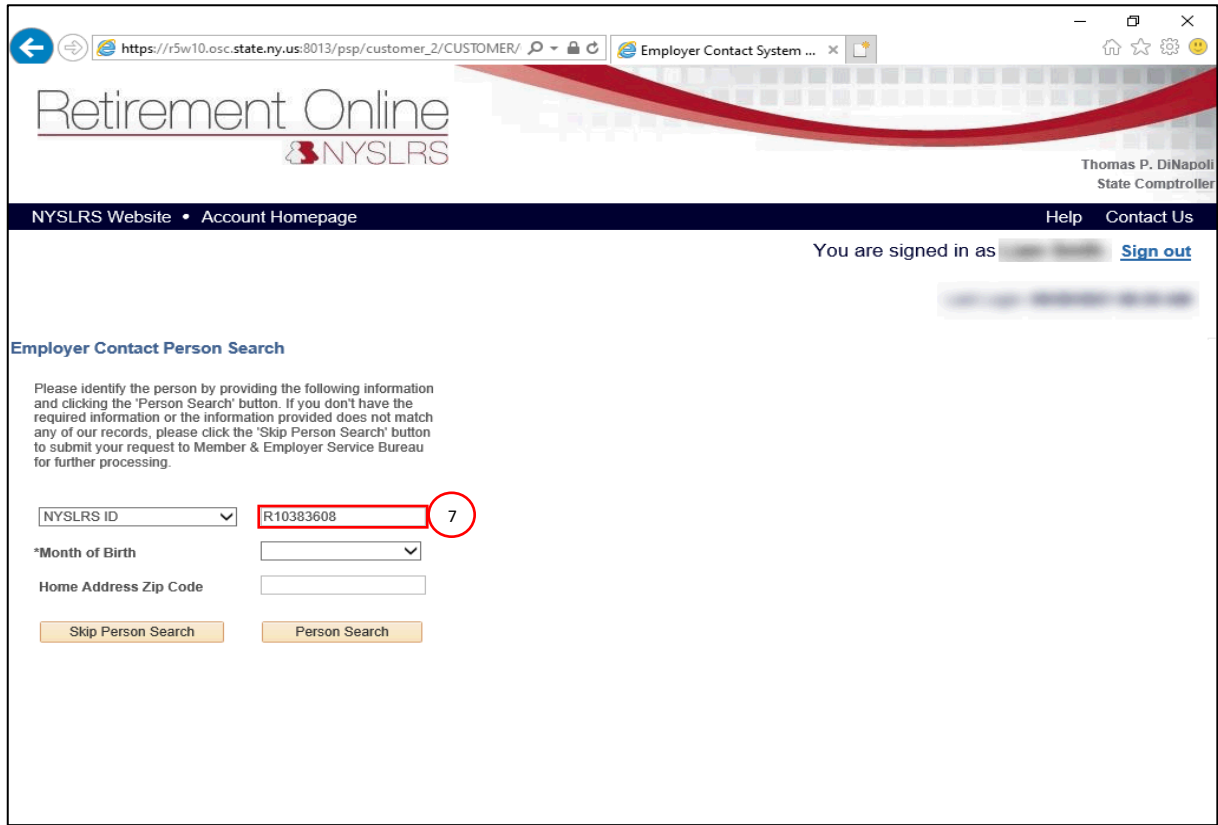
Registration Number ▼

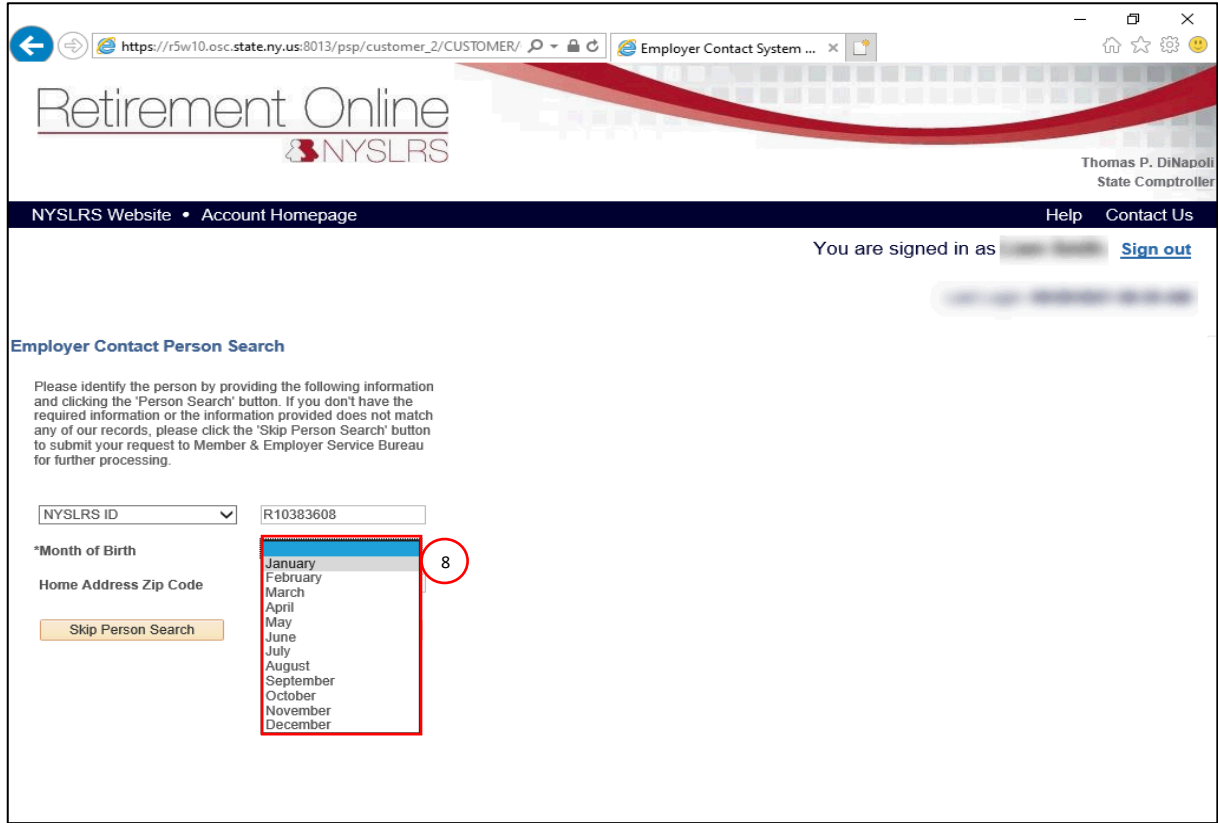
*Month of Birth 5

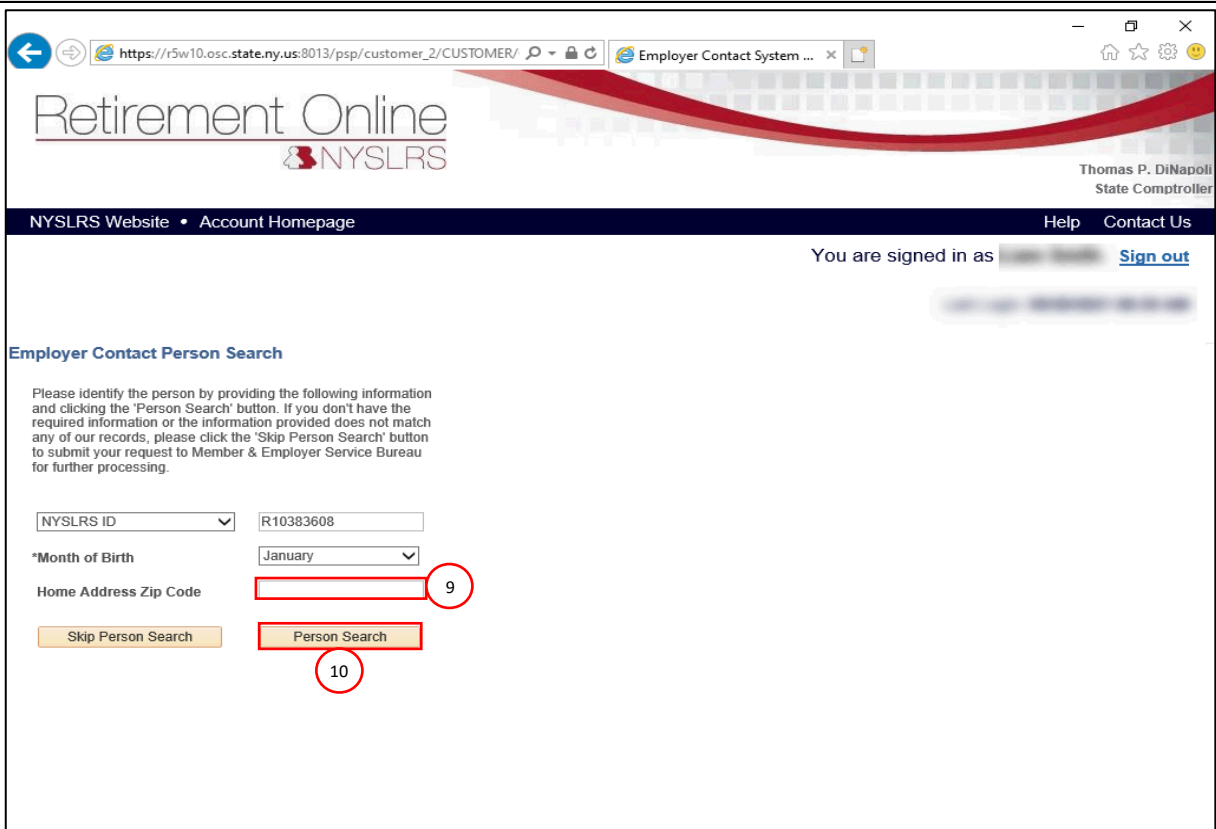
Home Address Zip Code

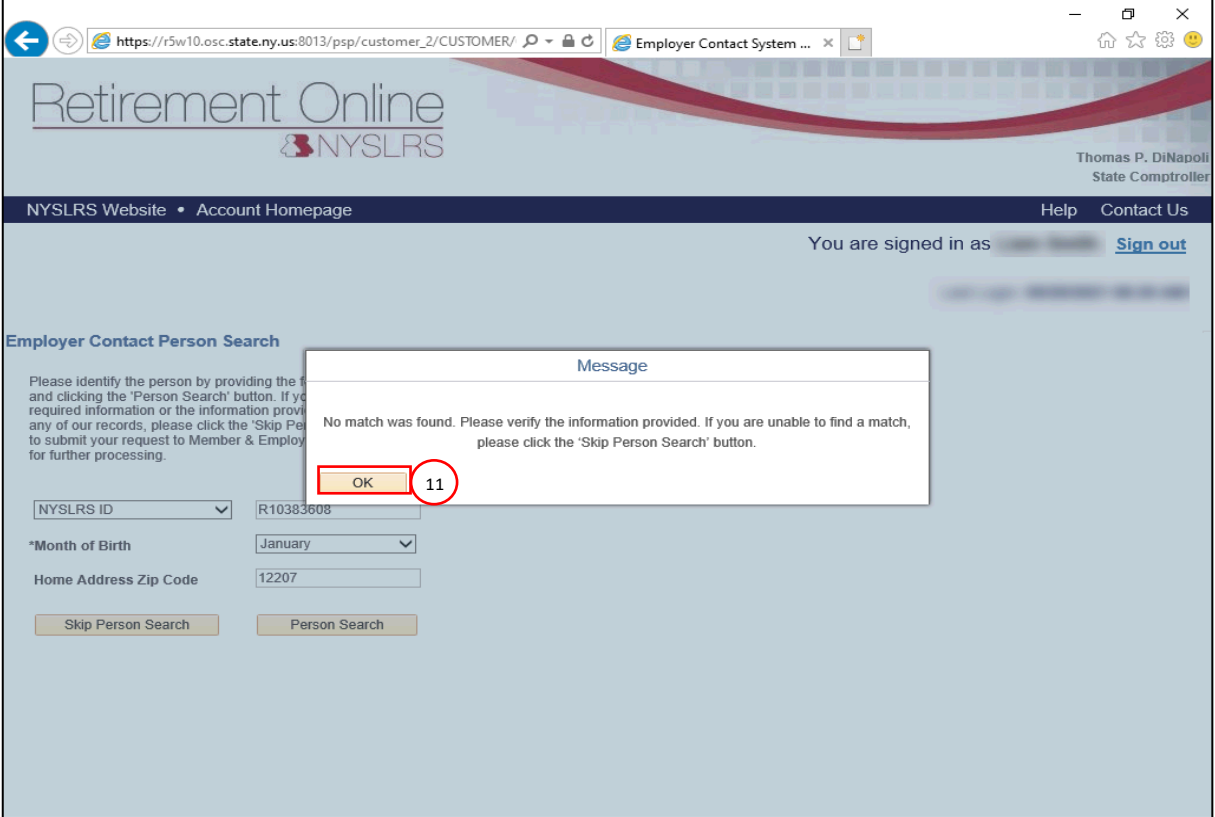
[Skip Person Search](#) [Person Search](#)

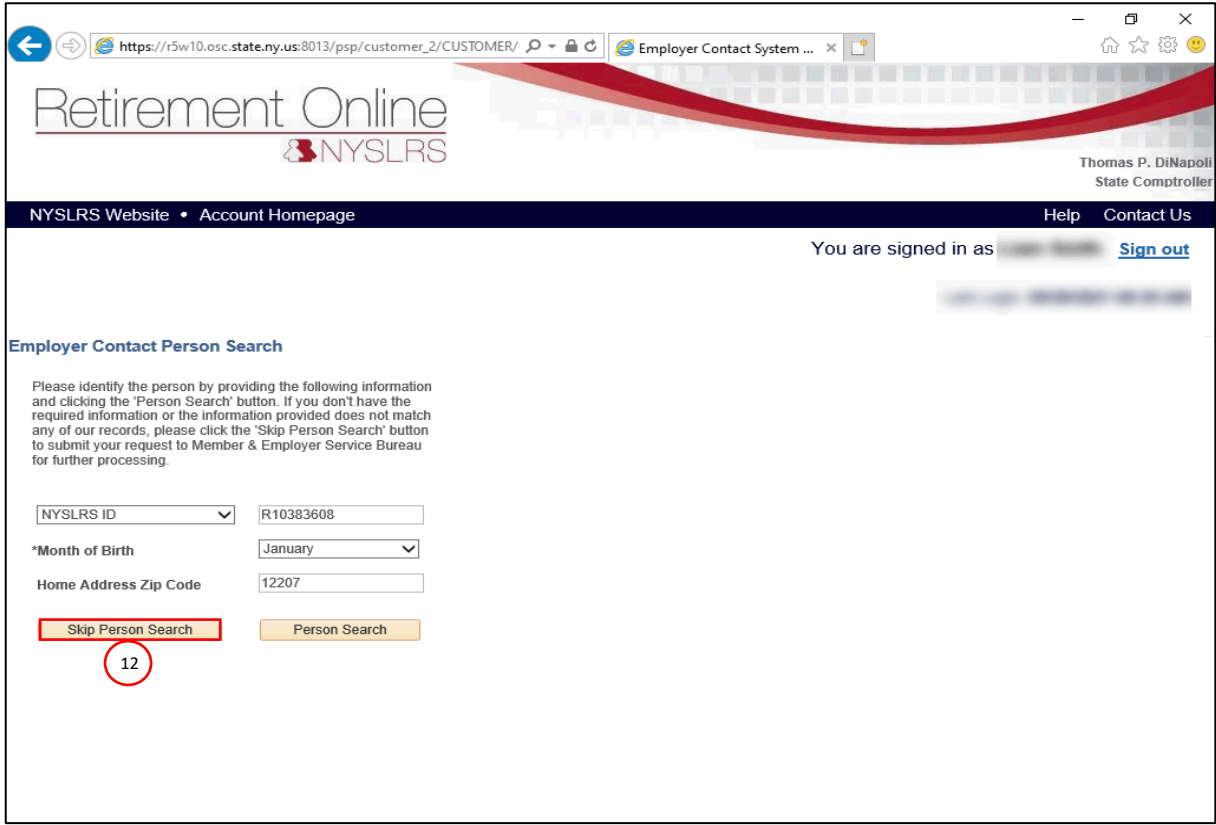
Step	Action
6.	<p>Select NYSLRS ID from the ID Type drop-down to identify the employer contact.</p>  <p>The screenshot shows the Retirement Online website interface. At the top, there is a navigation bar with 'NYSLRS Website' and 'Account Homepage'. Below this, a message states 'You are signed in as [Name] with a [Role]'. The main section is titled 'Employer Contact Person Search'. It contains a paragraph of instructions: 'Please identify the person by providing the following information and clicking the 'Person Search' button. If you don't have the required information or the information provided does not match any of our records, please click the 'Skip Person Search' button to submit your request to Member & Employer Service Bureau for further processing.' Below the instructions is a form with three input fields: 'Employer Document' (with a dropdown menu showing 'NYSLRS ID' selected), '*Month of Birth' (with a dropdown menu), and 'Home Address Zip Code'. At the bottom of the form are two buttons: 'Skip Person Search' and 'Person Search'. A red circle with the number 6 is placed over the 'Employer Document' dropdown menu.</p>

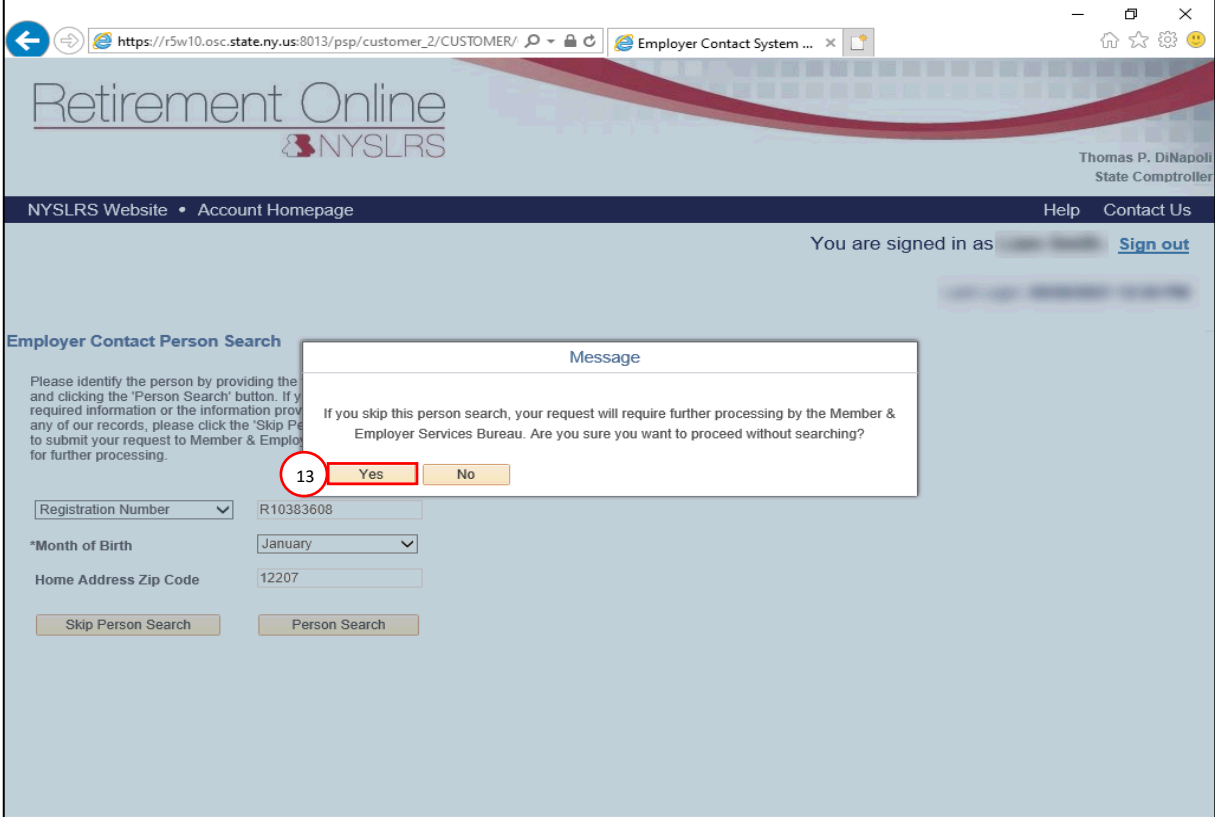
Step	Action
7.	<p>Click in the NYSLRS ID field, and enter the employer contact's NYSLRS ID.</p> <div data-bbox="266 355 550 393" style="border: 1px solid black; height: 23px; width: 135px;"></div> <div data-bbox="667 196 1877 1016">  <p>The screenshot shows the Retirement Online NYSLRS website. The browser address bar displays the URL: https://r5w10.osc.state.ny.us:8013/psp/customer_2/CUSTOMER/. The page header includes the NYSLRS logo and the name Thomas P. DiNapoli, State Comptroller. A navigation bar contains links for NYSLRS Website, Account Homepage, Help, and Contact Us. Below the navigation bar, it indicates the user is signed in as [redacted] with a Sign out link. The main section is titled "Employer Contact Person Search" and contains instructions: "Please identify the person by providing the following information and clicking the 'Person Search' button. If you don't have the required information or the information provided does not match any of our records, please click the 'Skip Person Search' button to submit your request to Member & Employer Service Bureau for further processing." The form includes a dropdown for "NYSLRS ID" (set to R10383608), a dropdown for "*Month of Birth", and a text field for "Home Address Zip Code". At the bottom are two buttons: "Skip Person Search" and "Person Search". The NYSLRS ID field is highlighted with a red box, and a circled 7 is next to it.</p> </div>

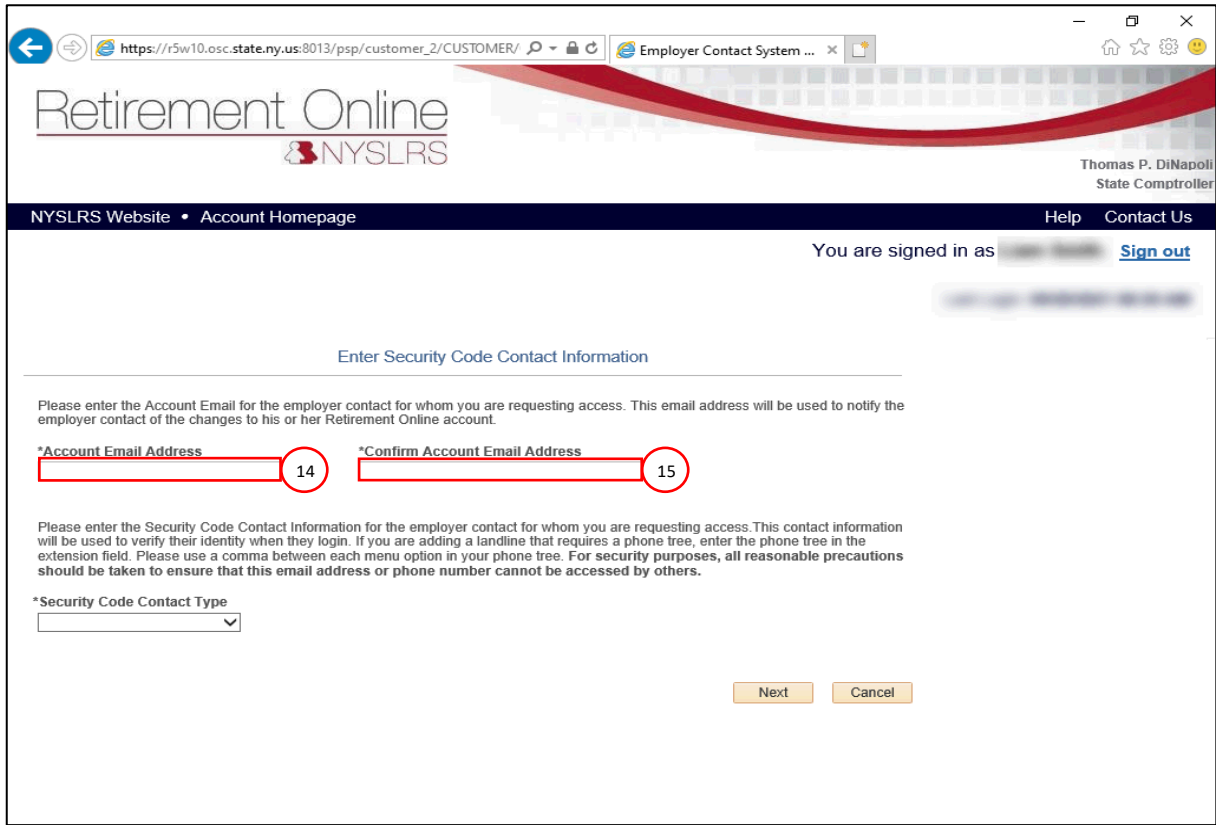
Step	Action
8.	<p>Next, select the Month of Birth drop-down to select the employer contact's month of birth.</p> <div data-bbox="266 355 543 393" data-label="Form"> <input type="text"/> </div> <div data-bbox="667 198 1877 1016" data-label="Form">  <p>The screenshot shows the Retirement Online NYSLRS website. The browser address bar displays the URL: https://r5w10.osc.state.ny.us:8013/psp/customer_2/CUSTOMER/. The page title is "Retirement Online NYSLRS". The user is signed in as Thomas P. DiNapoli, State Comptroller. The page shows the "Employer Contact Person Search" form. The form includes fields for "NYSLRS ID" (R10383608), "*Month of Birth", and "Home Address Zip Code". The "*Month of Birth" dropdown menu is open, showing a list of months from January to December. A red box highlights the dropdown menu, and a red circle with the number 8 is next to it.</p> </div>

Step	Action	
9.	Click in the Home Address Zip Code field, and enter the employer contact's home address zip code. <input data-bbox="268 354 539 393" type="text"/>	
10.	Once you have completed entering the required fields, click the Person Search button. <input data-bbox="268 760 539 799" type="button" value="Person Search"/>	

Step	Action
<p>11</p>	<p>If the information entered does not match NYSLRS records, a 'Message' pop-up will appear.</p> <p>If the information is a match, you will not see this pop-up message and may proceed to Step 14.</p> <p>Click the OK button to continue.</p> 

Step	Action
12	<p>Click the Skip Person Search button.</p>  <p>The screenshot shows the Retirement Online NYSLRS website. The browser address bar displays the URL: https://r5w10.osc.state.ny.us:8013/psp/customer_2/CUSTOMER/. The page header includes the NYSLRS logo and the name Thomas P. DiNapoli, State Comptroller. A navigation bar contains links for NYSLRS Website, Account Homepage, Help, and Contact Us. The user is signed in, with a 'Sign out' link. The main content area is titled 'Employer Contact Person Search' and contains instructions: 'Please identify the person by providing the following information and clicking the 'Person Search' button. If you don't have the required information or the information provided does not match any of our records, please click the 'Skip Person Search' button to submit your request to Member & Employer Service Bureau for further processing.' Below the instructions are input fields for NYSLRS ID (R10383608), *Month of Birth (January), and Home Address Zip Code (12207). At the bottom of the form are two buttons: 'Skip Person Search' (highlighted with a red box and a circled '12') and 'Person Search'.</p>

Step	Action
<p>13.</p>	<p>If you proceed directly to the Skip Person Search button without performing a person search first, a 'Message' pop-up will appear to inform you a Member and Employer Services Bureau staff member will need to review your request before access is granted.</p> <p>Click the Yes button.</p> <p>Yes</p> 

Step	Action	
14.	<p>The <i>Enter Security Code Contact Information</i> page will appear.</p> <p>Click in the Account Email Address field, and enter the employer contact's email.</p> <div data-bbox="266 513 623 545" style="border: 1px solid black; height: 20px; width: 170px;"></div>	
15.	<p>Click in the Confirm Account Email Address field, and re-enter the employer contact's email.</p> <div data-bbox="266 818 623 850" style="border: 1px solid black; height: 20px; width: 170px;"></div>	

Step	Action
<p>16</p>	<p>Next, use the drop-down to select the Security Code Contact Type. The contact type selected will determine where security codes will be sent. You may choose to receive the security code by email, landline or mobile phone.</p> <p>Security codes are used to validate a <i>Retirement Online</i> account when signing in.</p> <p>Select the Security Code Contact Type drop-down to choose the employee's security code contact type.</p> <div data-bbox="266 938 619 982"> <input type="text"/> </div>

Retirement Online
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NYSLRS Website • Account Homepage

Help Contact Us

You are signed in as testingteam@osc.ny.gov [Sign out](#)

Enter Security Code Contact Information

Please enter the Account Email for the employer contact for whom you are requesting access. This email address will be used to notify the employer contact of the changes to his or her Retirement Online account.

*Account Email Address
testingteam@osc.ny.gov

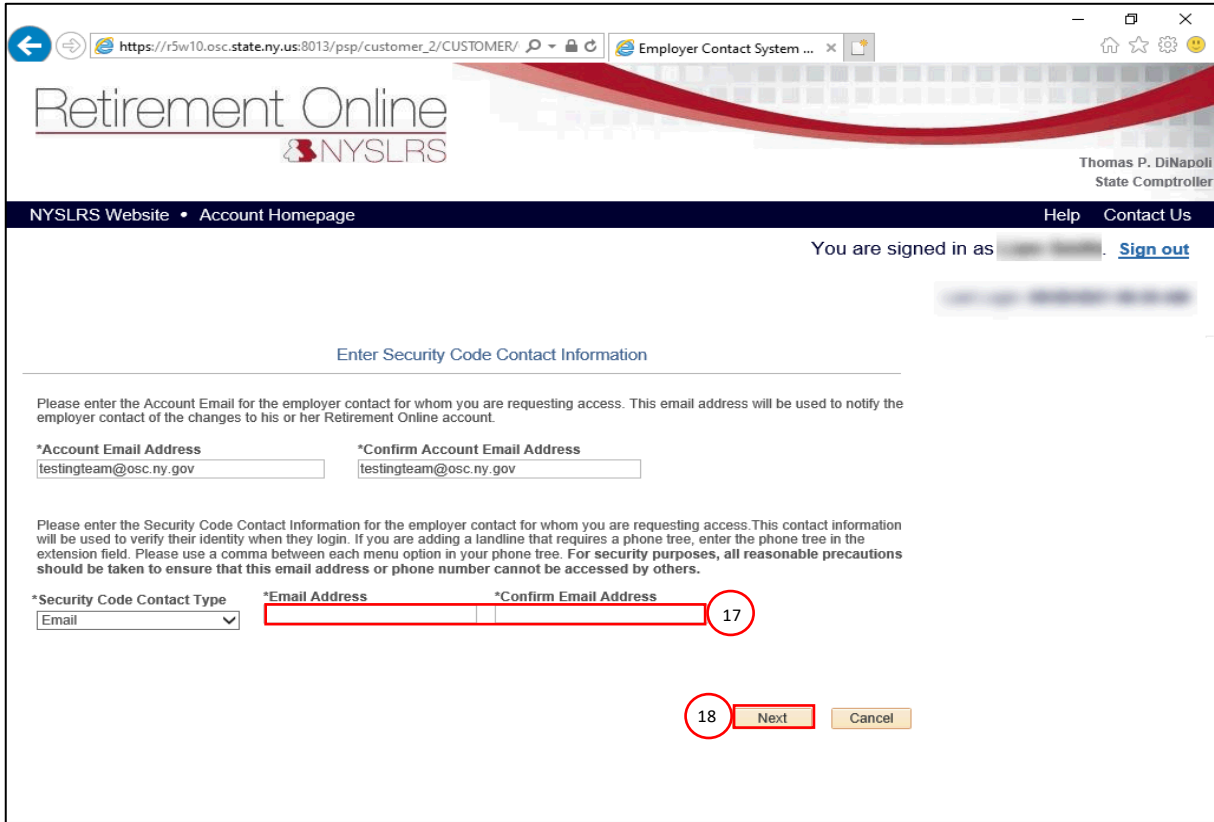
*Confirm Account Email Address
testingteam@osc.ny.gov

Please enter the Security Code Contact Information for the employer contact for whom you are requesting access. This contact information will be used to verify their identity when they login. If you are adding a landline that requires a phone tree, enter the phone tree in the extension field. Please use a comma between each menu option in your phone tree. For security purposes, all reasonable precautions should be taken to ensure that this email address or phone number cannot be accessed by others.

*Security Code Contact Type

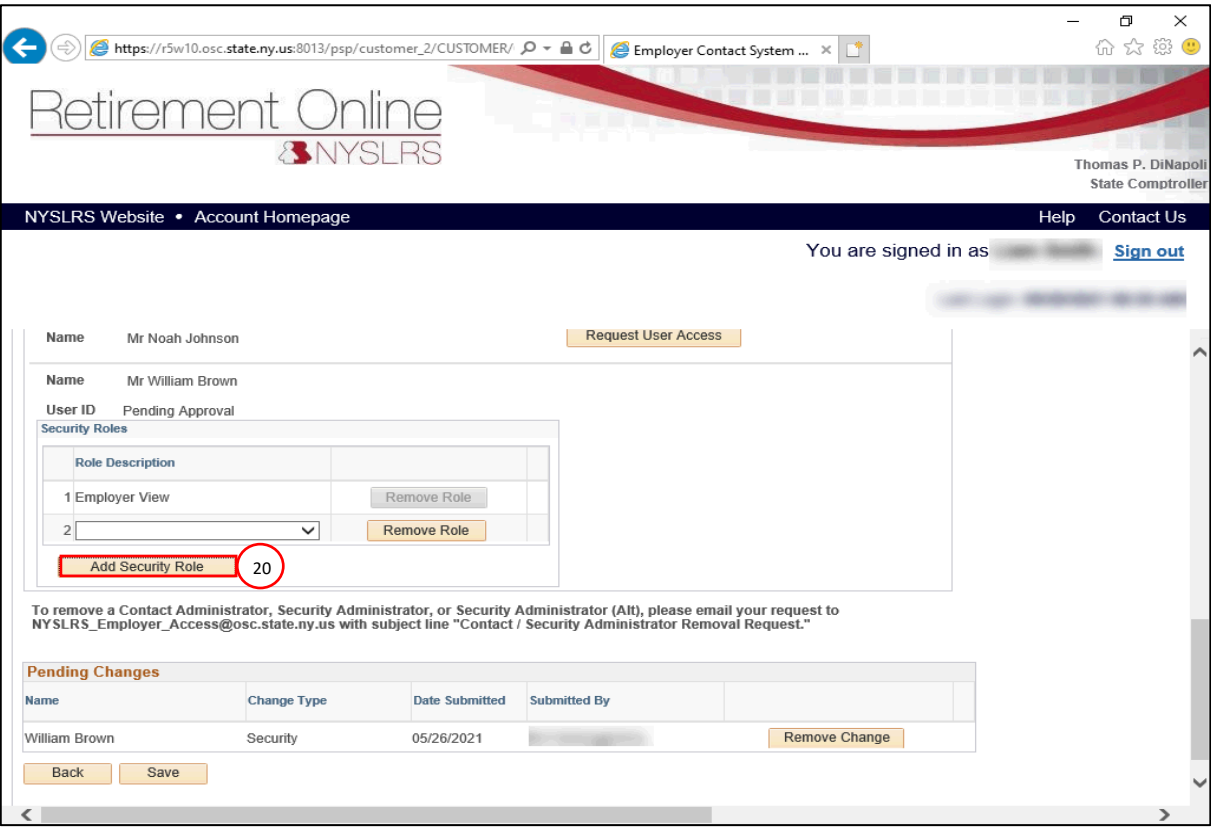
Email
Landline
Mobile Phone

Next Cancel

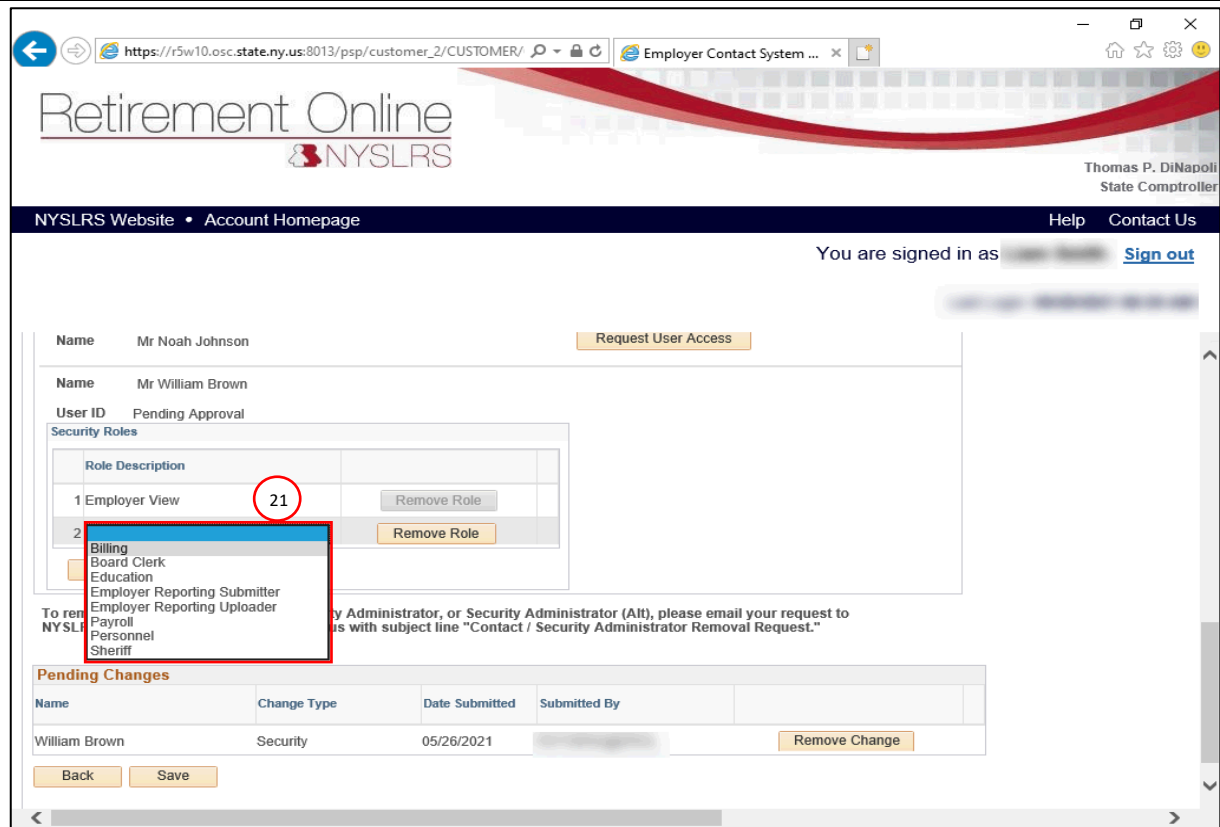
Step	Action	
17	<p>The fields that populate will depend on the selection. Required fields are designated by an asterisk *. Click in the required fields and enter the appropriate information.</p> <p>Note: If a phone number is selected, please do not include parenthesis, dashes or slashes. This field will format automatically as soon as you click in the confirmation field. International phone numbers are not accepted.</p>	
18.	<p>Click the Next button.</p> <p>Next</p>	

Step	Action
<p>19</p>	<p>You will return to the <i>Employer Retirement Online Access</i> page.</p> <p>You will see your request added to the page with a User ID of "Pending Approval". You will also see the change in the 'Pending Changes' section if it requires approval by Member and Employer Services Bureau.</p> <p>To add a security role, scroll if necessary until you see the Add Security Role button under the employer contact for whom you are adding a security role.</p> <p>Note: If you do not need to add a security role, proceed to step 23.</p>

The screenshot shows the Retirement Online NYSLRS website. The browser address bar displays the URL: https://r5w10.osc.state.ny.us:8013/psp/customer_2/CUSTOMER/. The page title is "Retirement Online NYSLRS". The user is logged in as "Thomas P. DiNapoli, State Comptroller". The page shows the "Pending Changes" section for "Mr William Brown" with a "Security" change type submitted on "05/26/2021". A red double-headed arrow with the number 19 is positioned to the right of the page, indicating a scroll action.

Step	Action
20	<p>Click the Add Security Role button.</p> <div data-bbox="268 277 575 321">Add Security Role</div>  <p>The screenshot shows the Retirement Online NYSLRS website. At the top, there's a header with the NYSLRS logo and the name Thomas P. DiNapoli, State Comptroller. Below this is a navigation bar with 'NYSLRS Website • Account Homepage', 'Help', and 'Contact Us'. A message indicates the user is signed in as 'John Doe' with a 'Sign out' link. The main content area shows details for 'Mr Noah Johnson' and 'Mr William Brown' with a 'Request User Access' button. Under 'Security Roles', there's a table with two roles: '1 Employer View' and '2' (with a dropdown arrow). Both have 'Remove Role' buttons. The 'Add Security Role' button is circled in red. Below this is a note about removing roles and a 'Pending Changes' table. The table has columns: Name, Change Type, Date Submitted, Submitted By, and a 'Remove Change' button. The row shows 'William Brown' with 'Security' change type, dated '05/26/2021'. At the bottom are 'Back' and 'Save' buttons.</p>

Step	Action
<p>21</p>	<p>The security role drop-down will be populated with any roles available to each employer contact, and may look different for each contact.</p> <p>Select the drop-down to choose an option from the list.</p> <div data-bbox="262 592 623 621" style="border: 1px solid black; padding: 2px;">Billing</div> <p>Note: If you need to select additional roles for the employer contact, repeat steps 20 – 21. Continue this process until the employer contact has all the roles they need.</p>



The screenshot shows the Retirement Online NYSLRS website. The user is logged in as Mr. Noah Johnson. The page displays the account information for Mr. William Brown, including his User ID (Pending Approval) and a list of Security Roles. The Security Roles dropdown menu is open, showing a list of roles including Billing, Board Clerk, Education, Employer Reporting Submitter, Employer Reporting Uploader, Payroll, Personnel, and Sheriff. The number 21 is circled next to the dropdown menu.

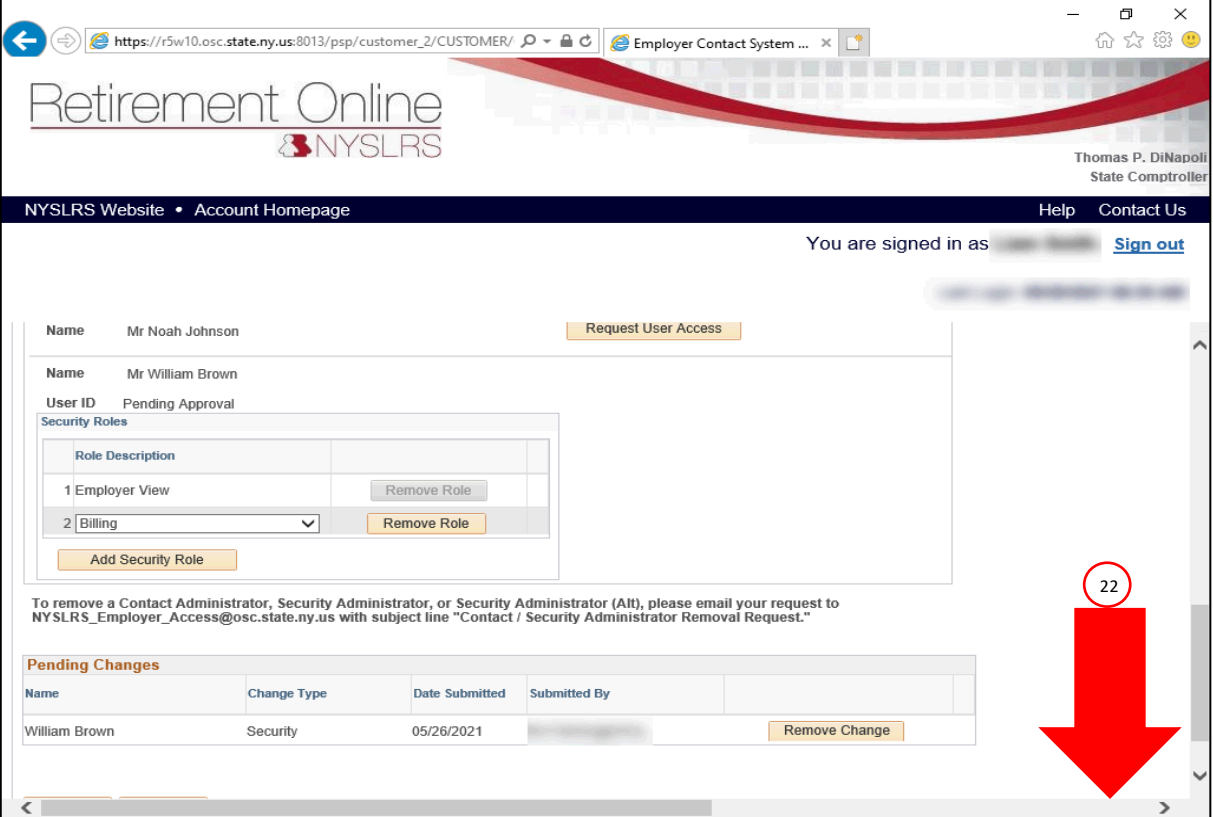
Role Description	
1 Employer View	Remove Role
2	Remove Role

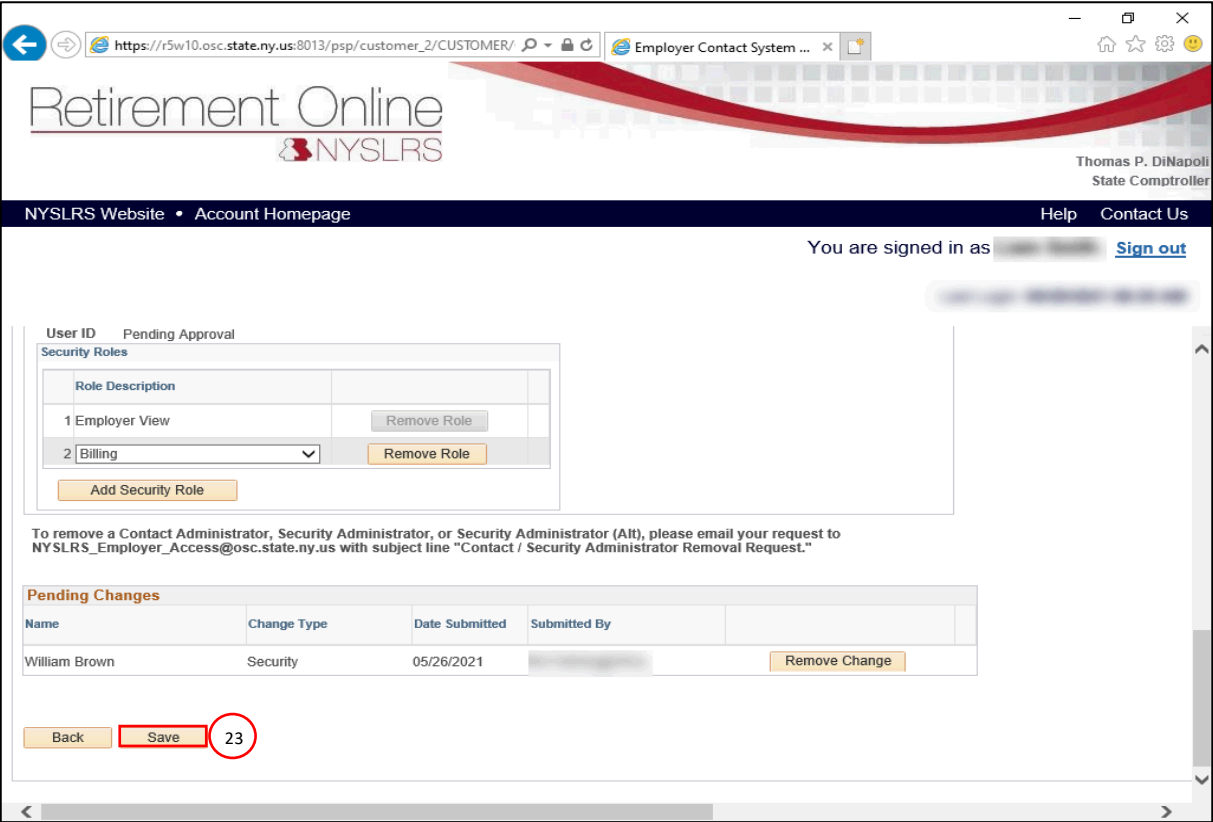
To remove a role, click the "Remove Role" button next to the role description.

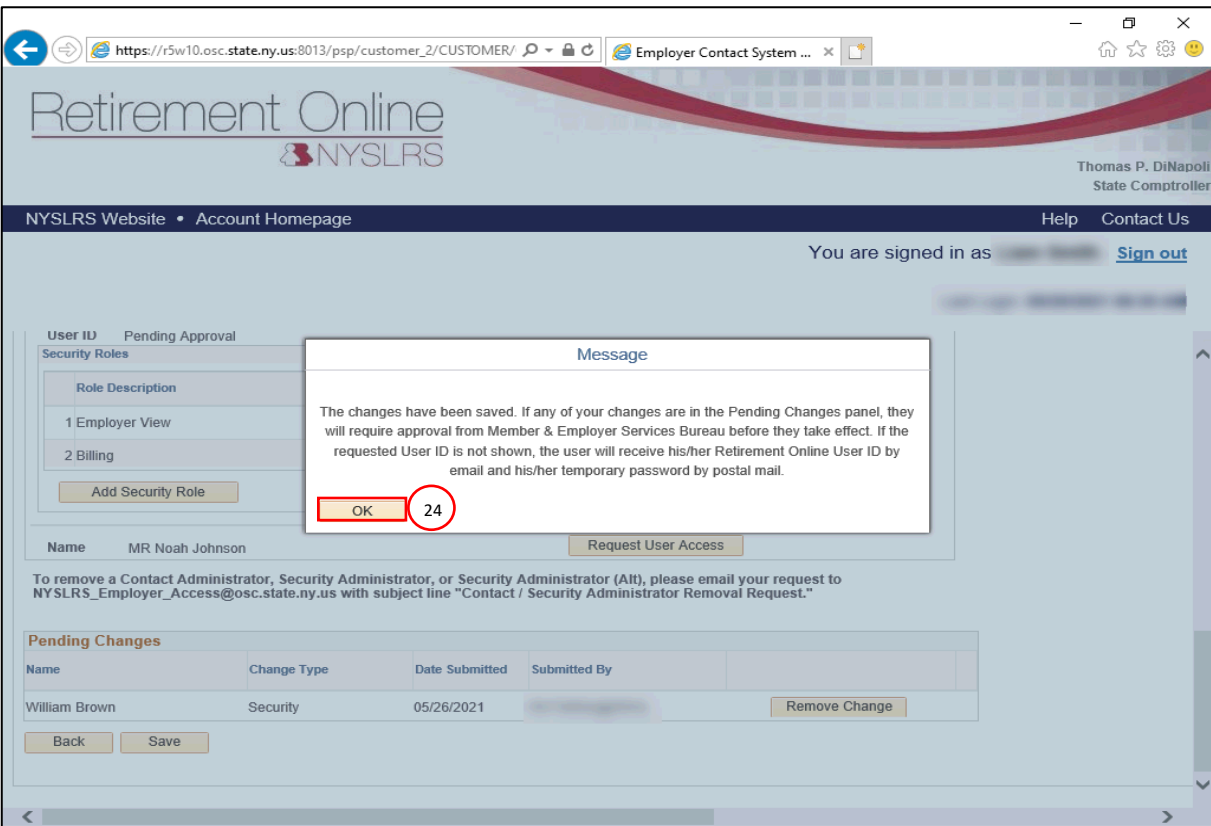
Pending Changes

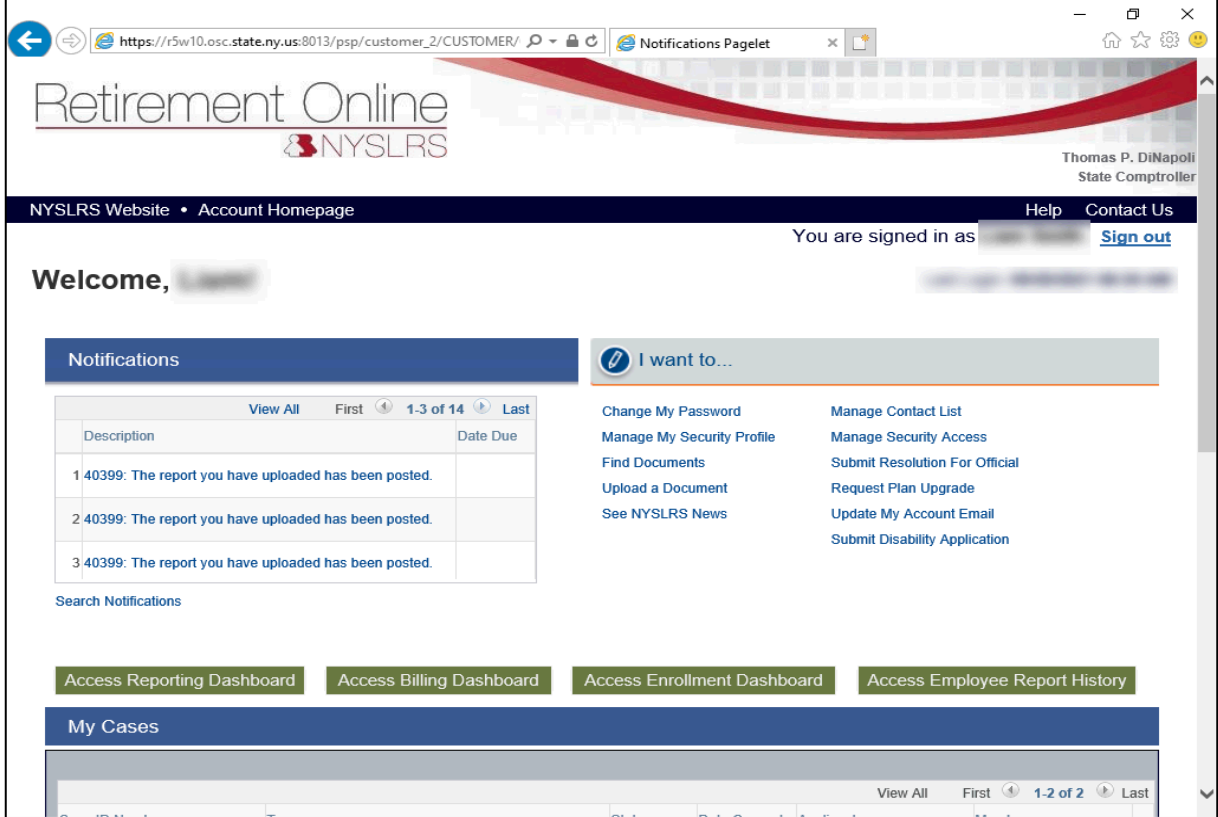
Name	Change Type	Date Submitted	Submitted By
William Brown	Security	05/26/2021	

Buttons: Back, Save, Remove Change

Step	Action
22.	<p>Once you have selected the security role(s), scroll down until you see the Save button.</p> 

Step	Action
23	<p>Click the Save button.</p> <div data-bbox="268 240 422 290">Save</div> 

Step	Action
<p>24</p>	<p>A 'Message' pop-up will appear.</p> <p>Note: If any of your changes are in the Pending Changes section, they will require approval from Member & Employer Services Bureau before they take effect. If the requested User ID is not shown, the user will receive his/her Retirement Online User ID by email and his/her temporary password by postal mail.</p> <p>After reviewing the information in the pop-up, click the OK button.</p> <p>OK</p> 

Step	Action
<p>26.</p>	<p>The <i>Retirement Online Account Homepage</i> will appear.</p> <p>You have successfully requested access and assigned security roles for an employer contact who does not have access to <i>Retirement Online</i>.</p>  <p>The screenshot displays the Retirement Online Account Homepage. At the top, there's a navigation bar with 'NYSLRS Website • Account Homepage' and links for 'Help' and 'Contact Us'. A user is signed in as 'Thomas P. DiNapoli, State Comptroller'. The main content area includes a 'Welcome' message, a 'Notifications' section with a table of three entries (all stating 'The report you have uploaded has been posted.'), and a 'My Cases' section. Below these are four buttons: 'Access Reporting Dashboard', 'Access Billing Dashboard', 'Access Enrollment Dashboard', and 'Access Employee Report History'. The browser address bar shows the URL 'https://r5w10.osc.state.ny.us:8013/psp/customer_2/CUSTOMER/'.</p>