Thomas P. DiNapoli, State Comptroller

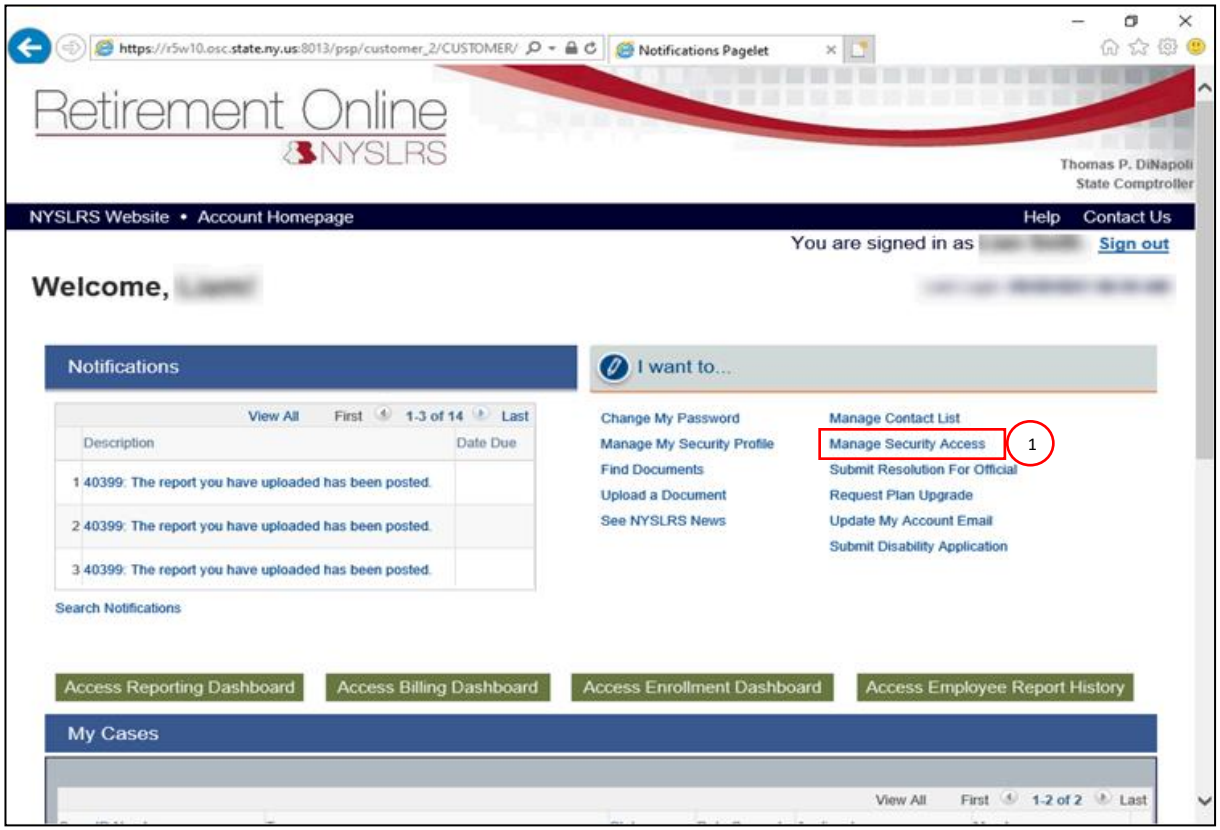
NYSLRS
New York State & Local Retirement System

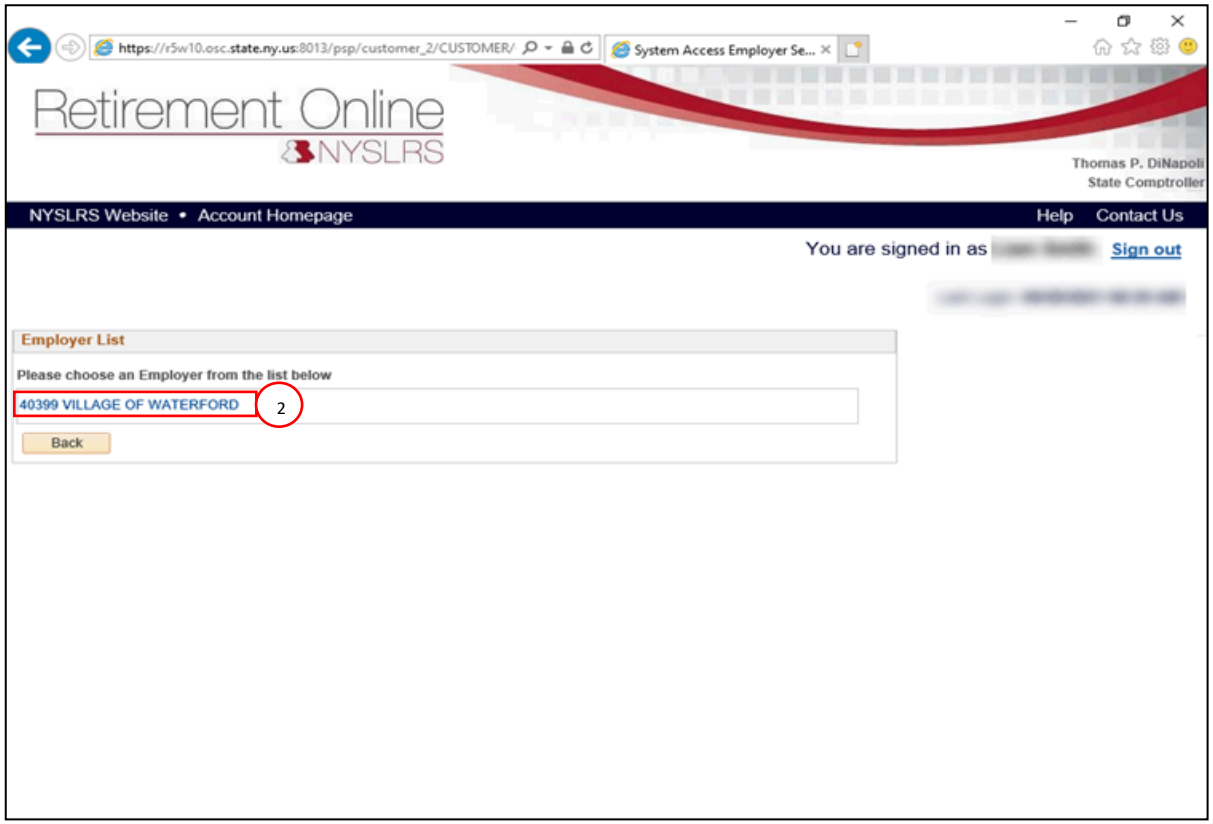
Request Access and Assign Security Roles to Retirement Online

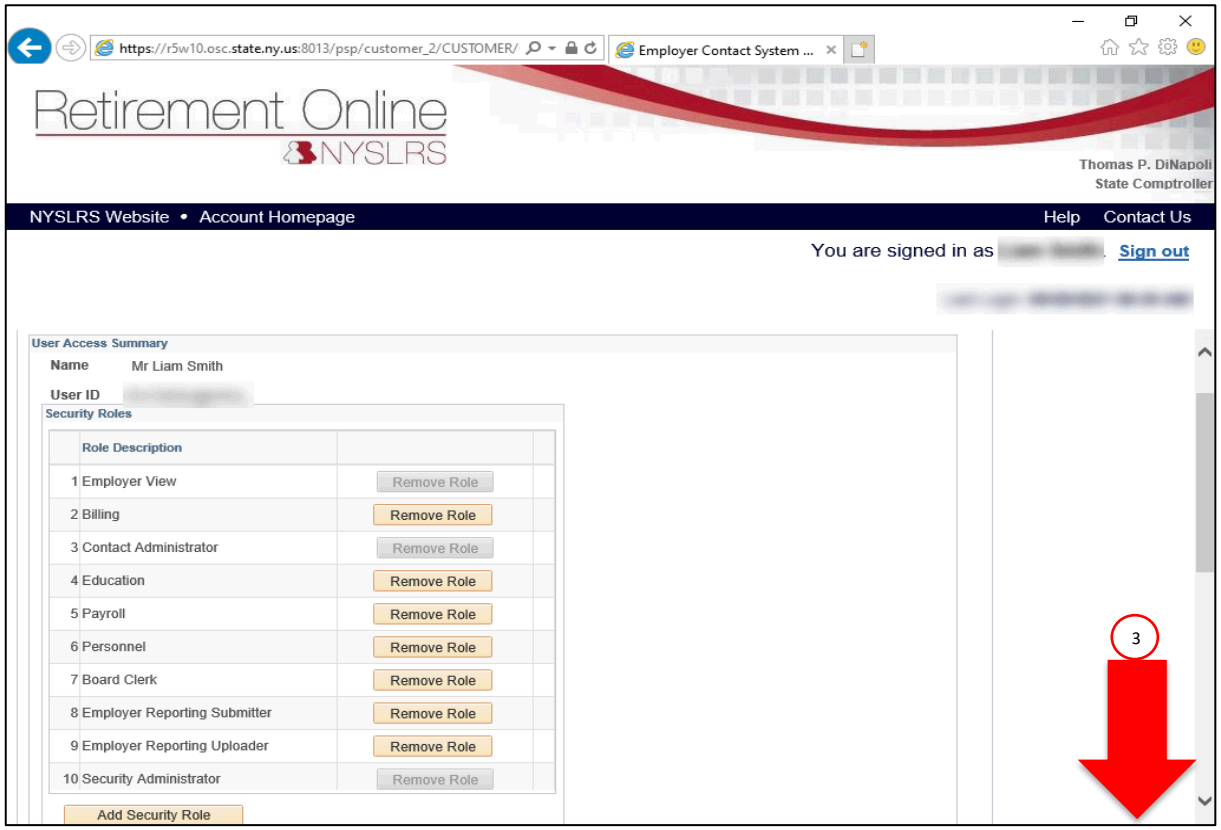
This simulation shows you (as an employer security administrator) how to request access and assign security roles for an employer contact who does not have access to *Retirement Online*. Before requesting access for a contact, make sure your employer contact administrator has added them as an employer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

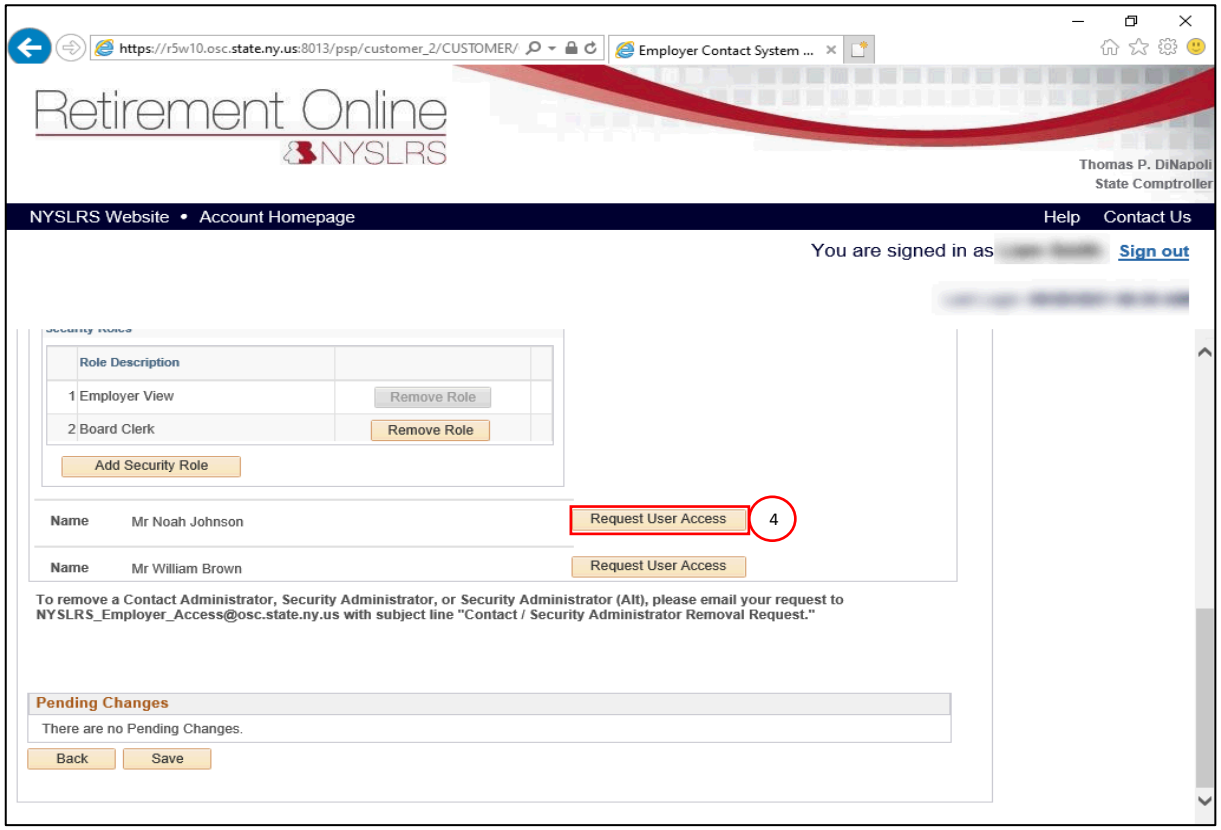
Once the employer contact is added by the Contact Administrator, only then can you (as an employer security administrator) request access and security roles. Once access has been granted, the employer contact will receive their log-in credentials for Retirement Online.

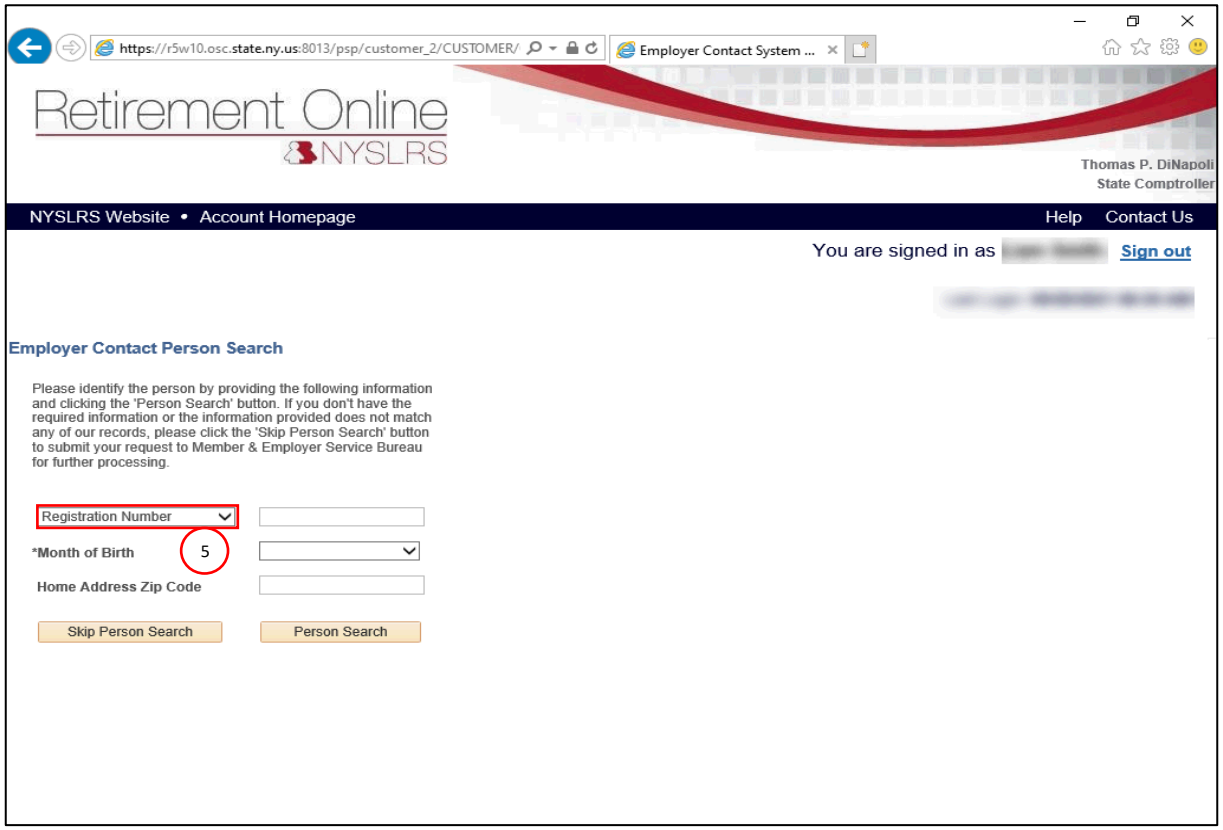
If you need to request access or assign security roles for a Security Administrator or Contact Administrator, you must submit the necessary form completed and signed by your CEO or CFO to NYSLRS. For more information, please visit the Contact and Security Administrator Roles page.

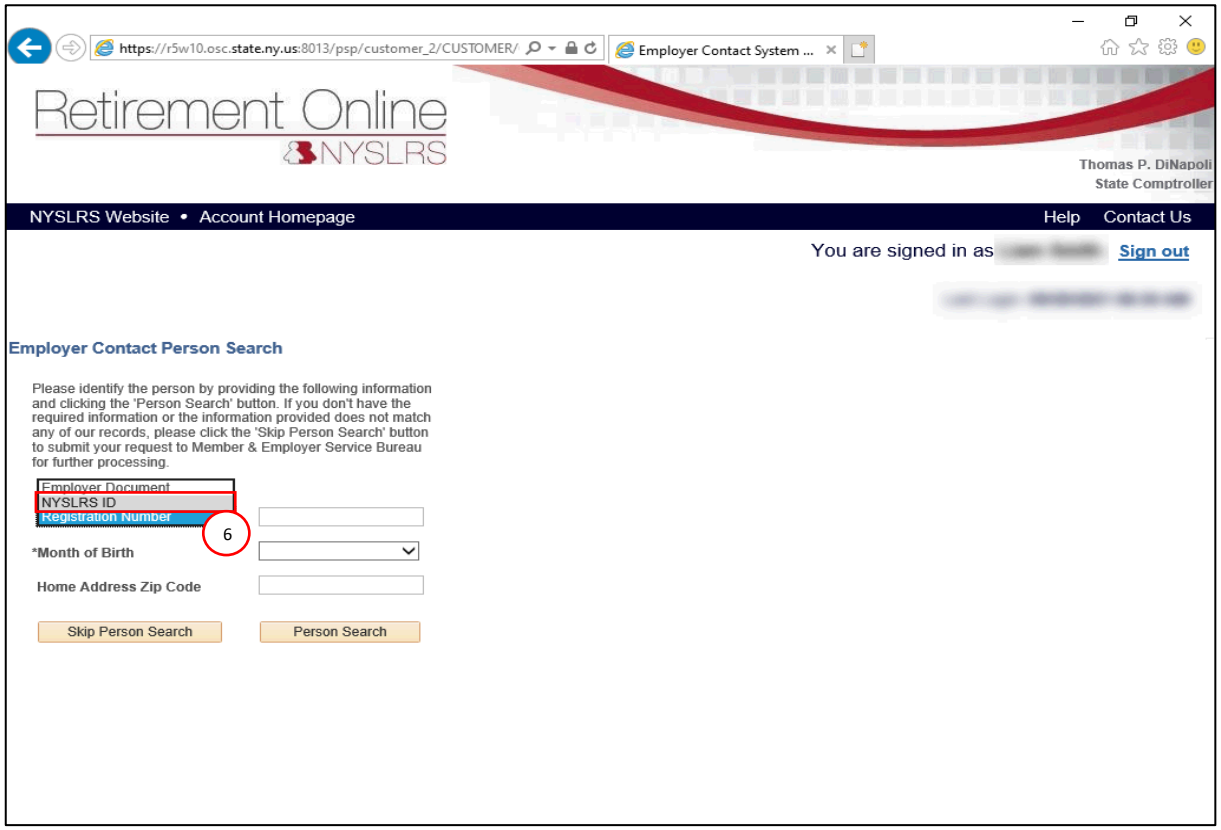
Step	Action	
1.	On your *Retirement Online Account Homepage*, in the 'I want to…' section, click the **Manage Security Access** link. Manage Security Access	

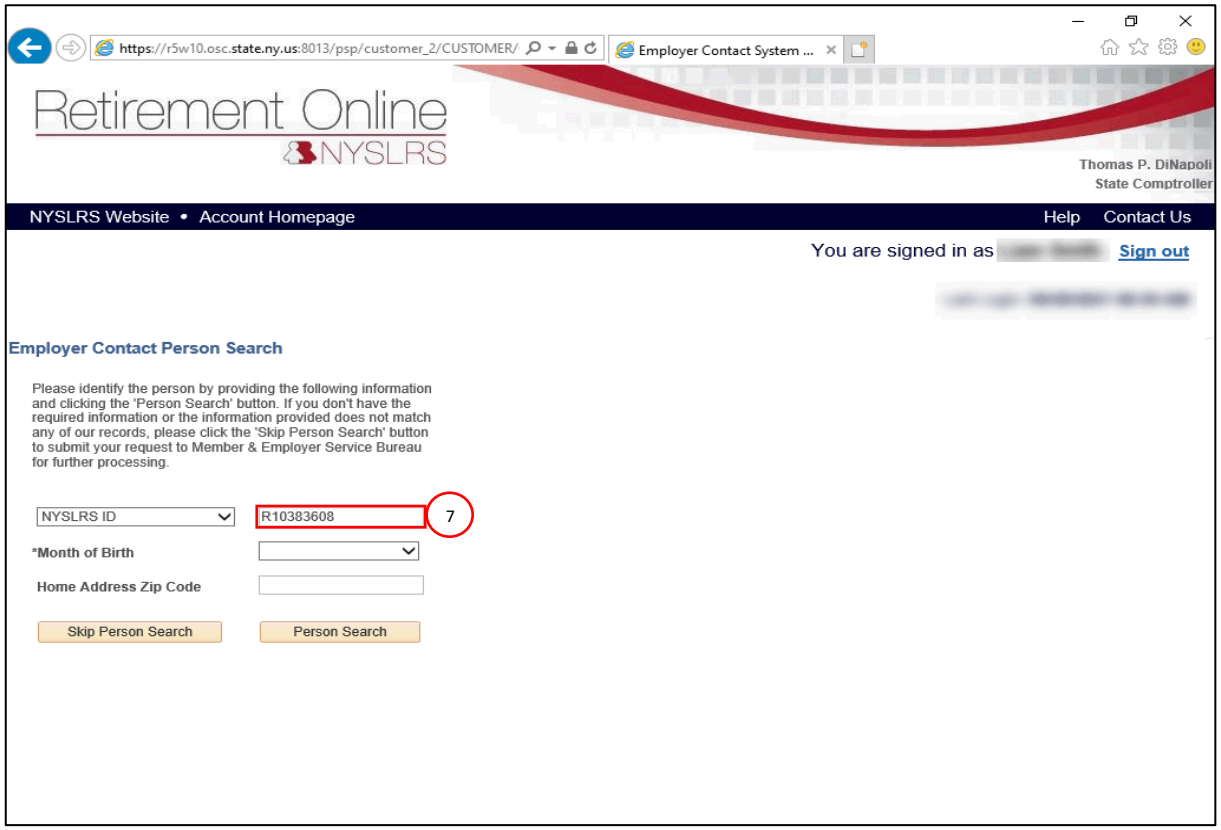
Step	Action	
2.	The *Employer List* page will appear. **Note:** You may have more than one employer location listed if you work for multiple employers. Click the link for the **Employer** of the employer contact for whom you are requesting access. 40399 VILLAGE OF WATERFORD	

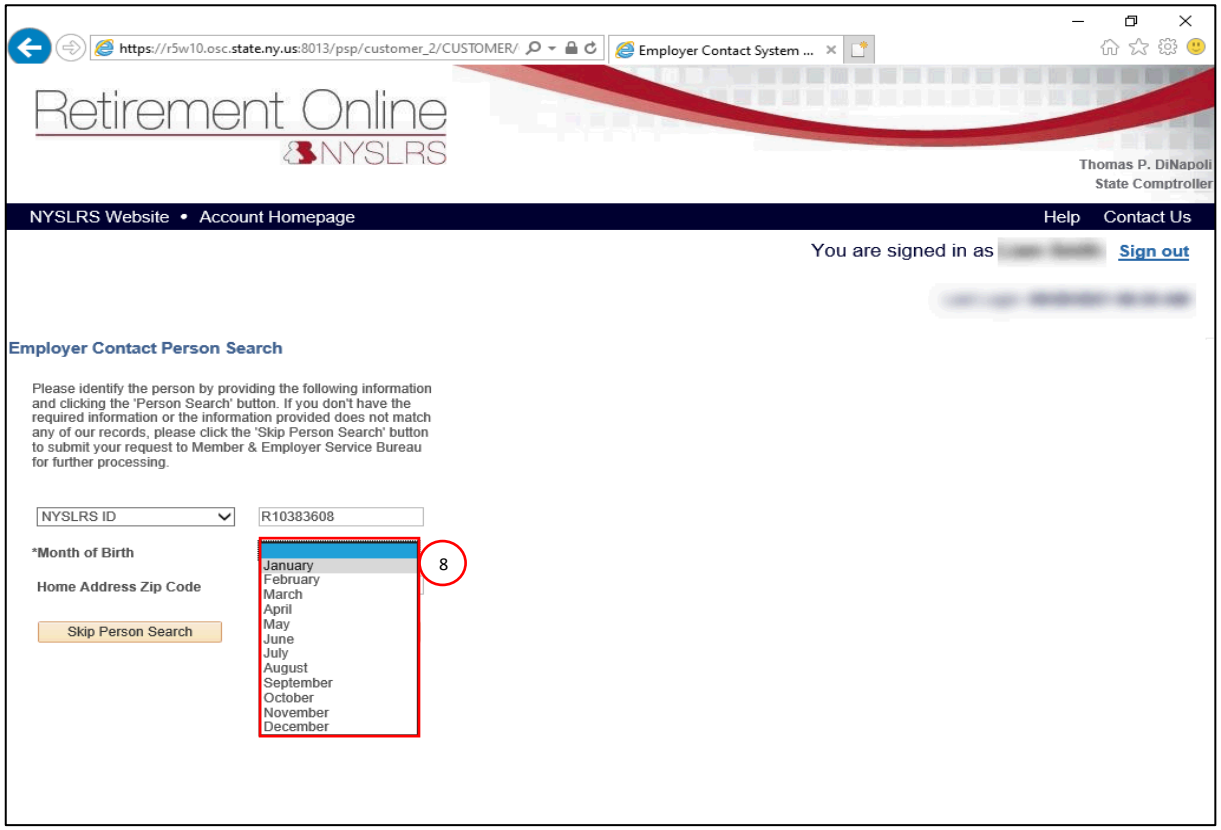
Step	Action	
3.	The *Employer Retirement Online Access* page will appear. **Scroll down** until you can see the **Request User Access** button under the 'User Access Summary' section.	

Step	Action	
4.	Under the 'User Access Summary' section, click the **Request User Access** button. Request User Access	

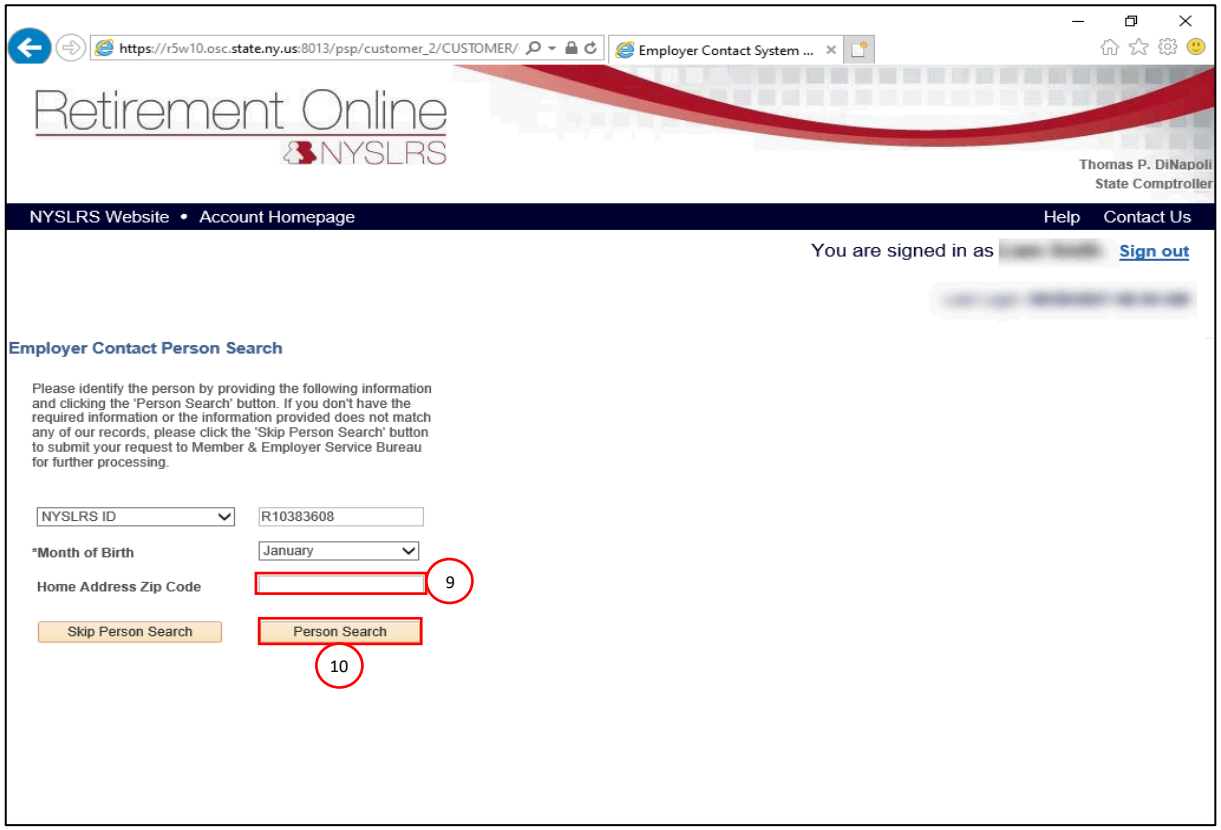
Step	Action	
5.	The *Employer Contact Person Search* page will appear. If you have the employer contact's information, select an ID type from the drop-down, then complete steps 6 – 11. Registration Number If you do not have the employer contact's information, proceed to Step 12.	

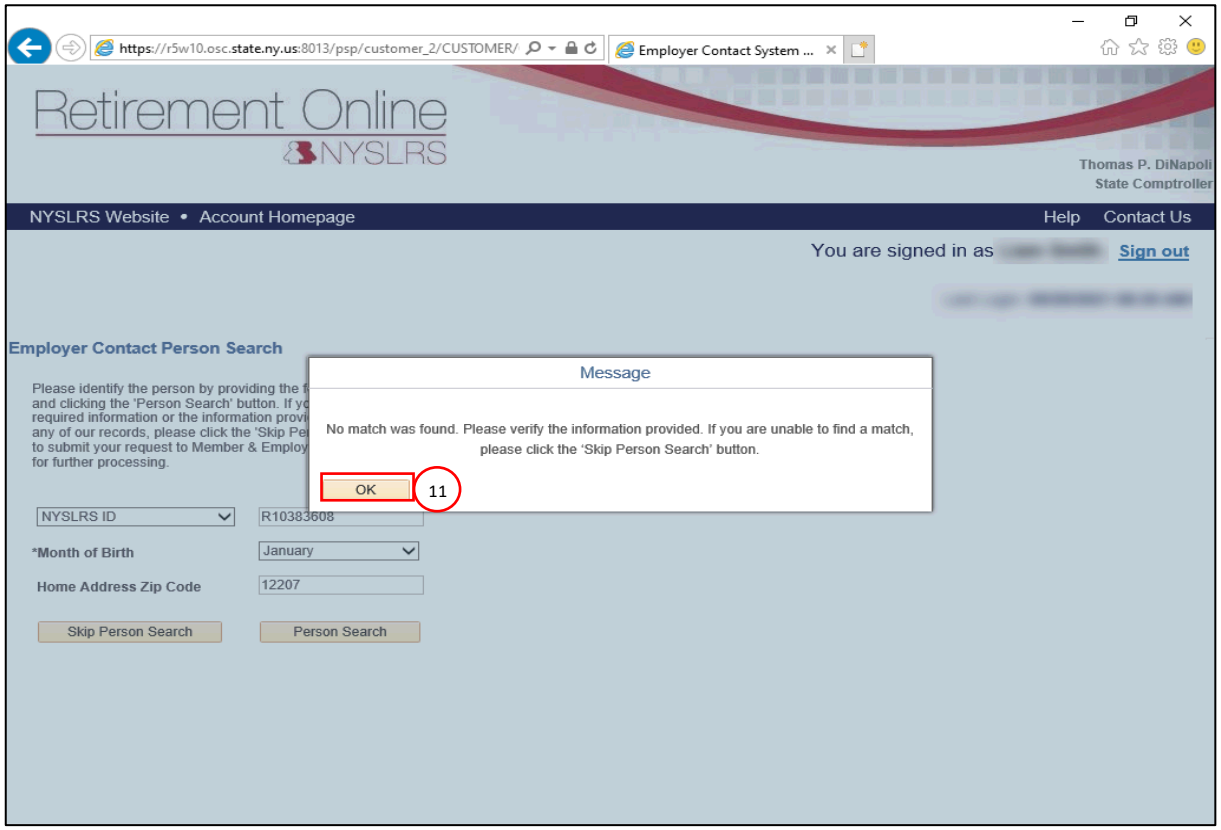
Step	Action	
6.	Select **NYSLRS ID** from the **ID Type** drop-down to identify the employer contact. NYSLRS ID	

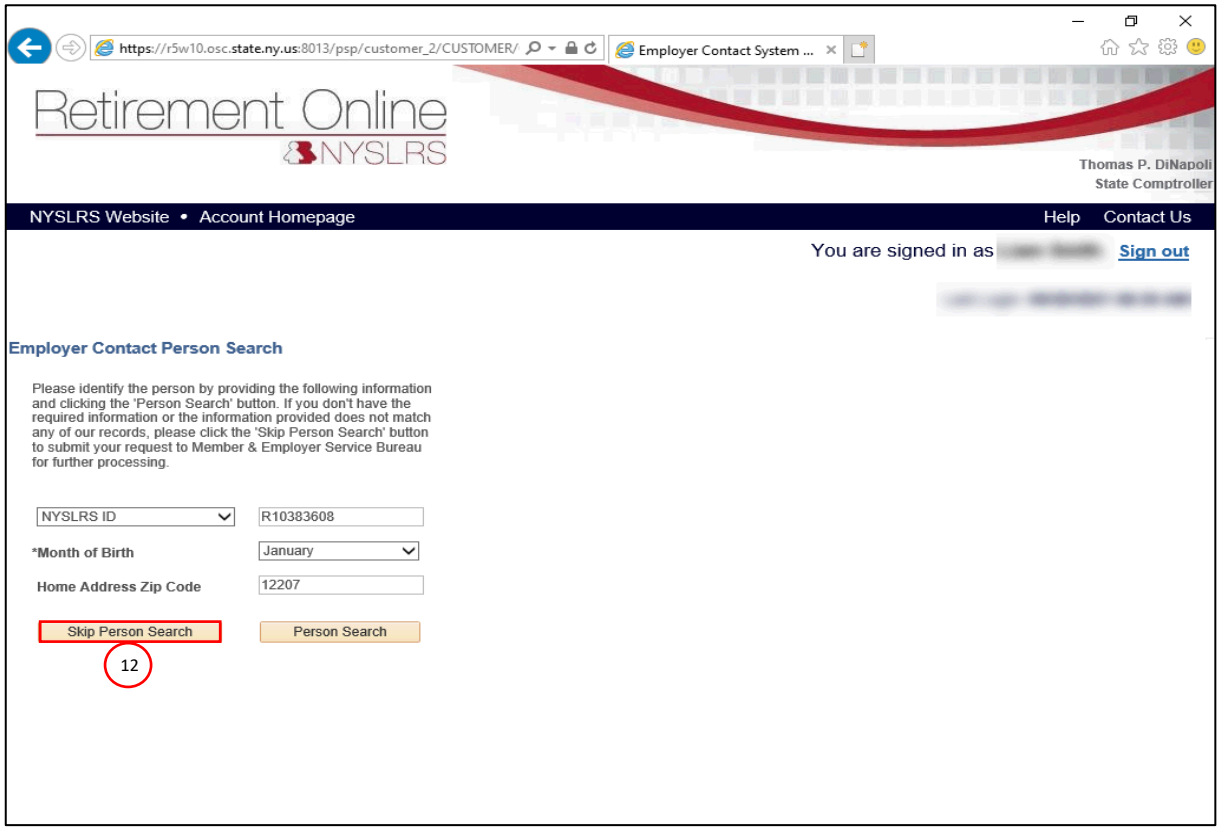
Step	Action	
7.	Click in the **NYSLRS ID** field, and enter the employer contact's NYSLRS ID.	

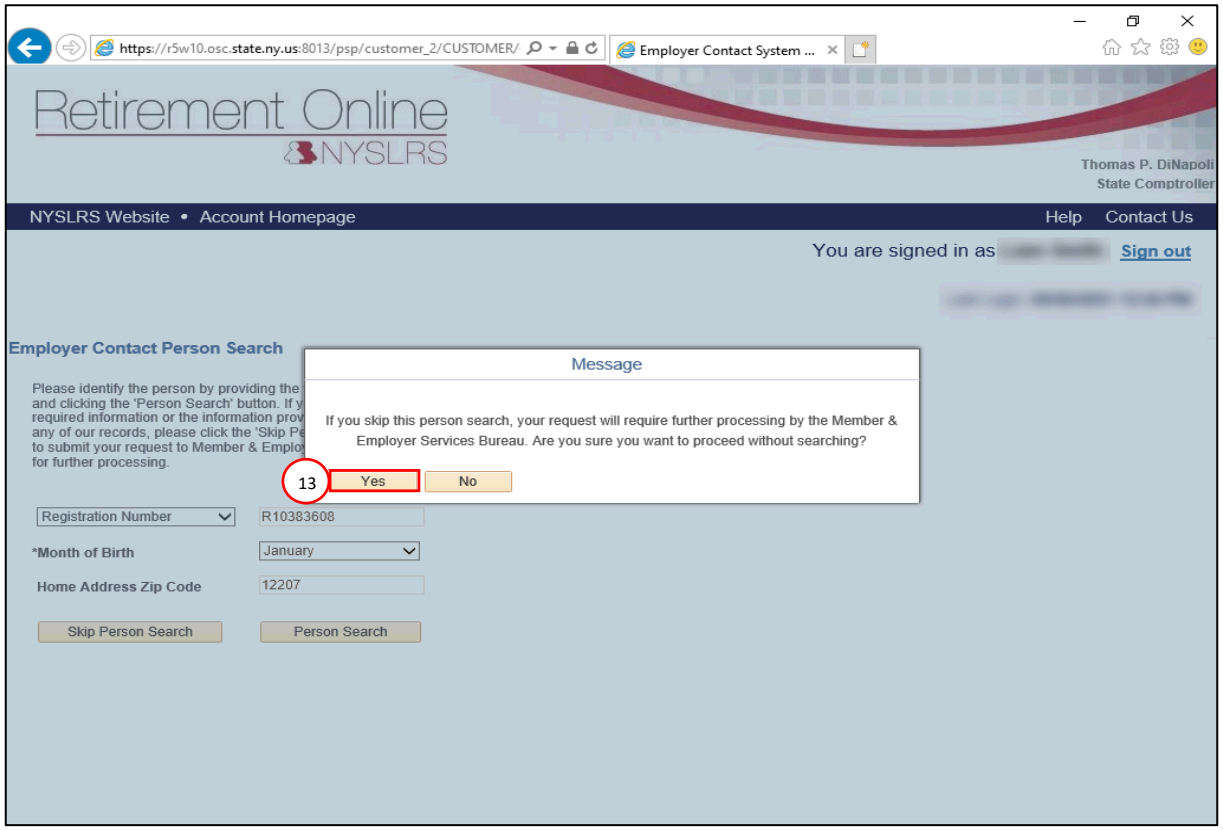
Step	Action	
8.	Next, select the **Month of Birth** drop-down to select the employer contact's month of birth.	

Step	Action
9.	Click in the **Home Address Zip Code** field, and enter the employer contact's home address zip code.
10.	Once you have completed entering the required fields, click the **Person Search** button. Person Search

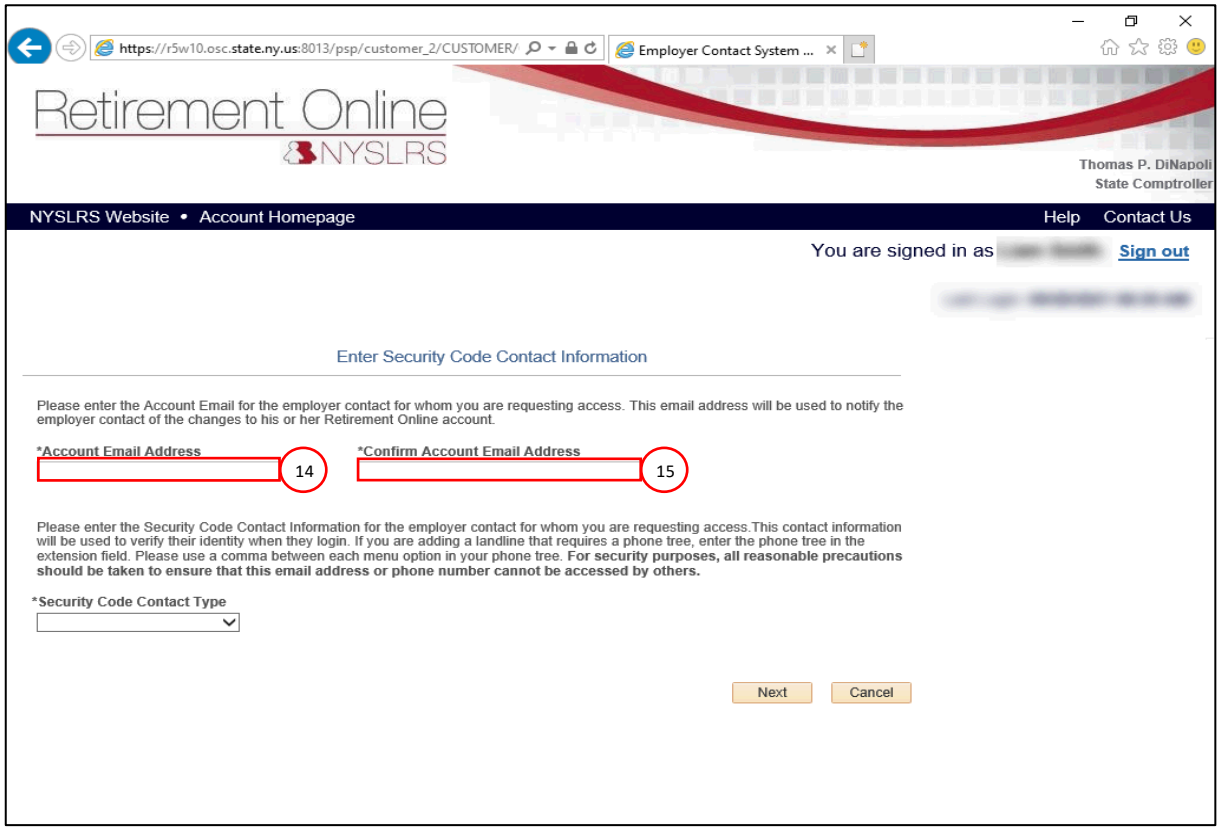


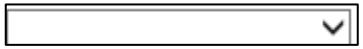
Step	Action	
11.	If the information entered does not match NYSLRS records, a 'Message' pop-up will appear. If the information is a match, you will not see this pop-up message and may proceed to Step 14. Click the **OK** button to continue. OK	

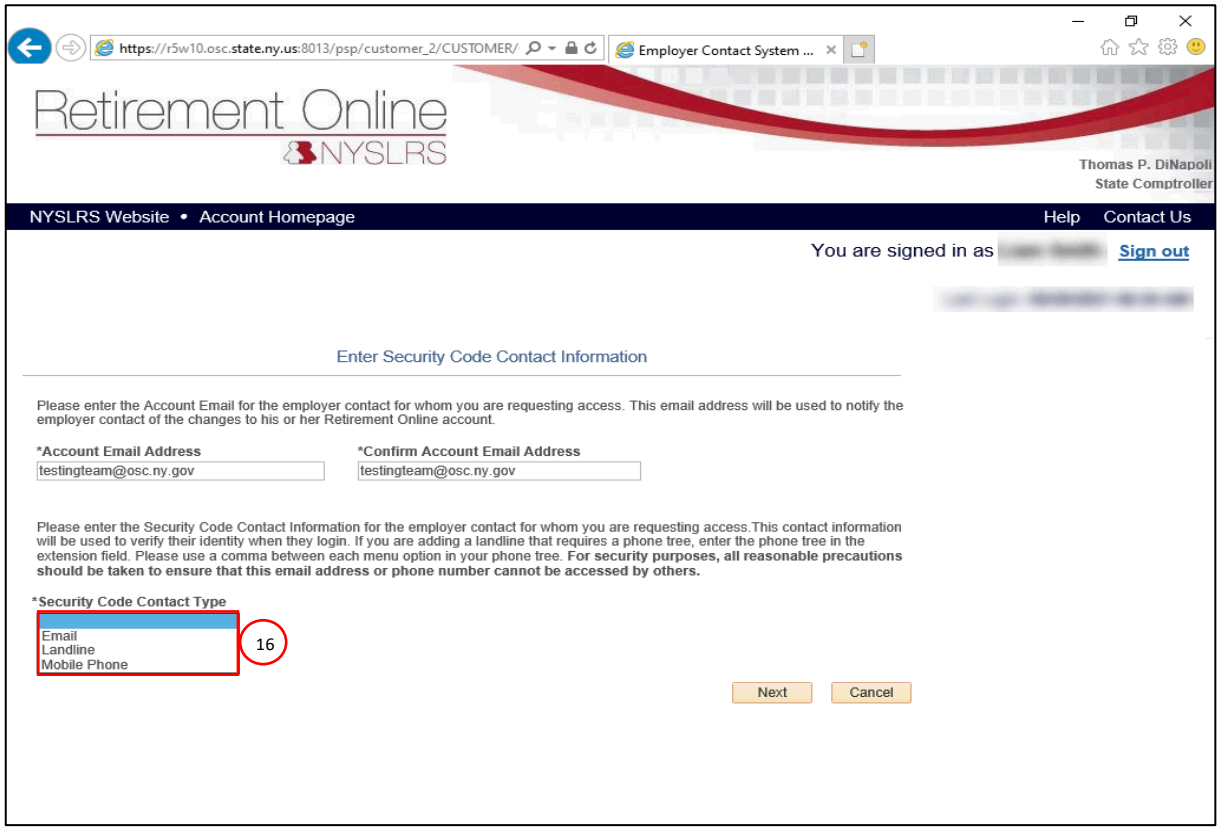
Step	Action	
12.	Click the **Skip Person Search** button. Skip Person Search	

Step	Action	
13.	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. Click the **Yes** button. Yes	

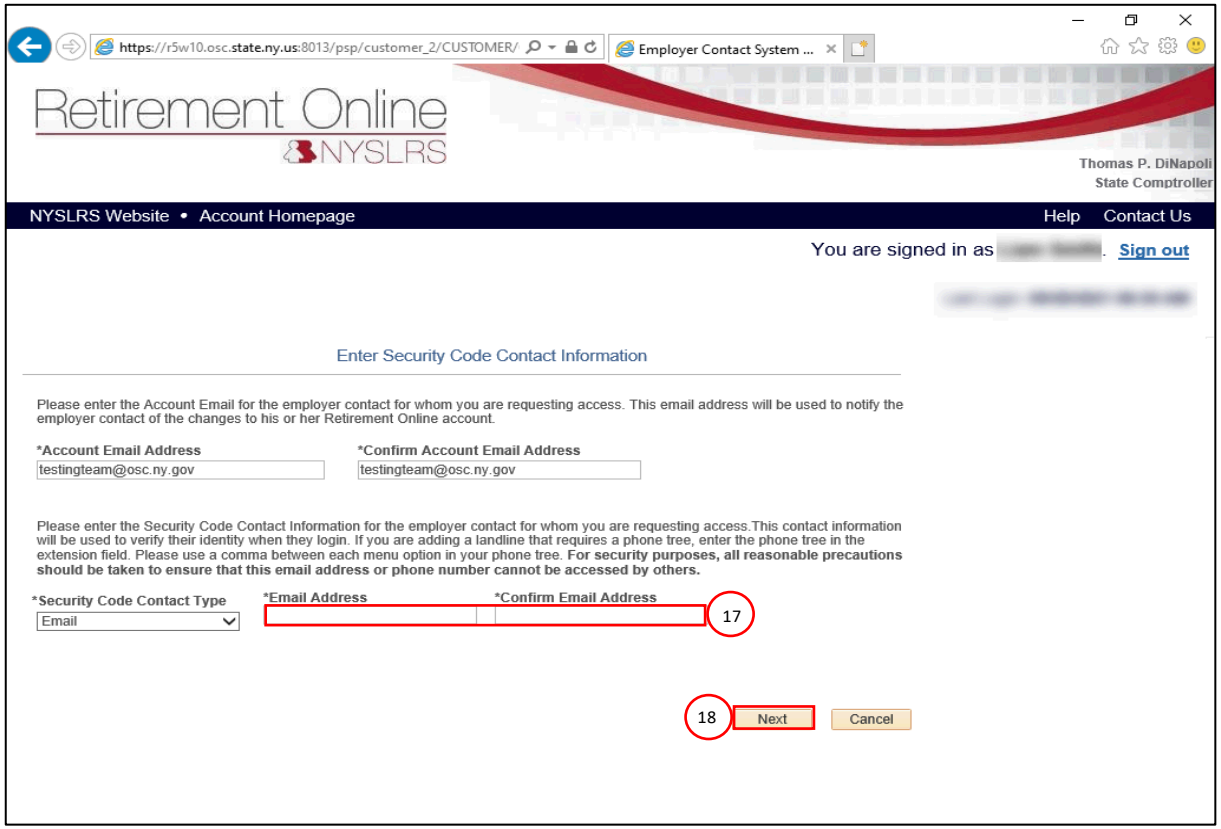
Step	Action
14.	The *Enter Security Code Contact Information* page will appear. Click in the **Account Email Address** field, and enter the employer contact's email.
15.	Click in the **Confirm Account Email Address** field, and re-enter the employer contact's email.

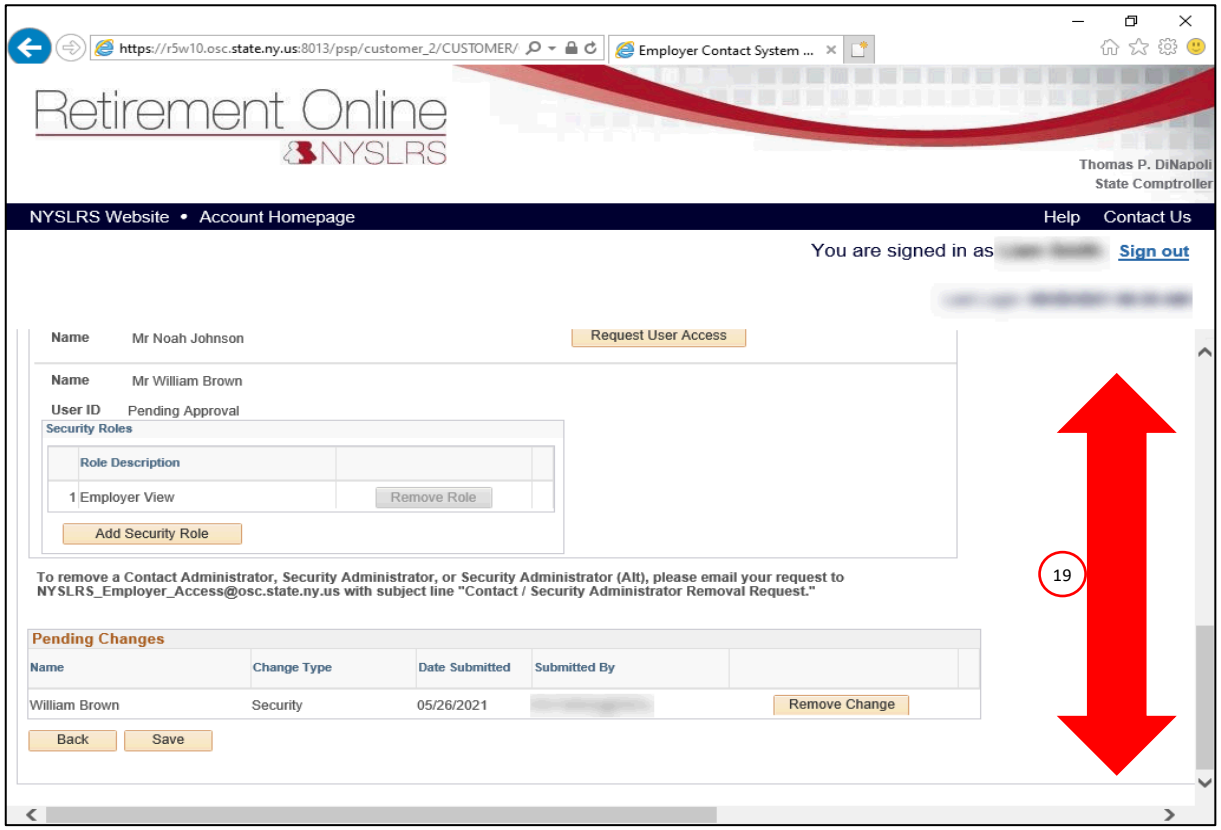


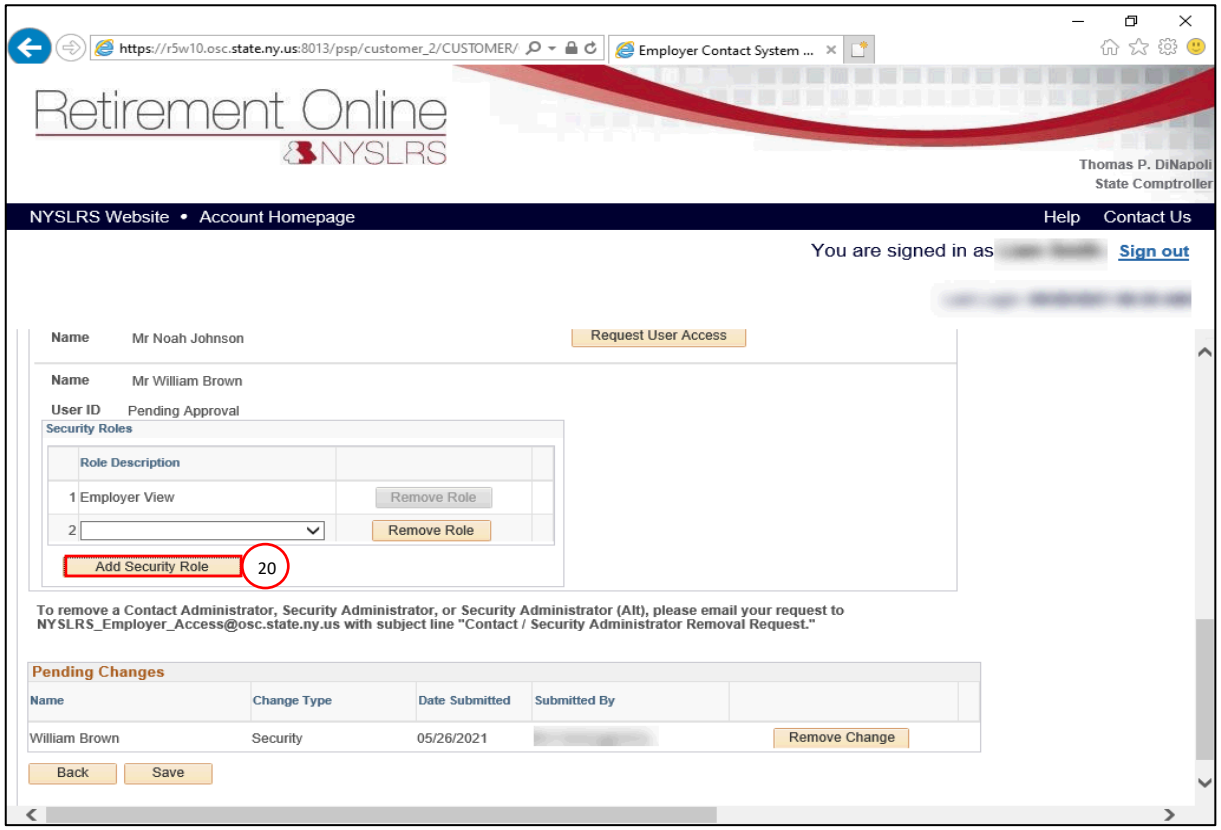
Step	Action
16	Next, use the drop-down to select the **Security Code Contact Type**. The contact type selected will determine where security codes will be sent. You may choose to receive the security code by email, landline or mobile phone. Security codes are used to validate a *Retirement Online* account when signing in. Select the **Security Code Contact Type** drop-down to choose the employee's security code contact type. 



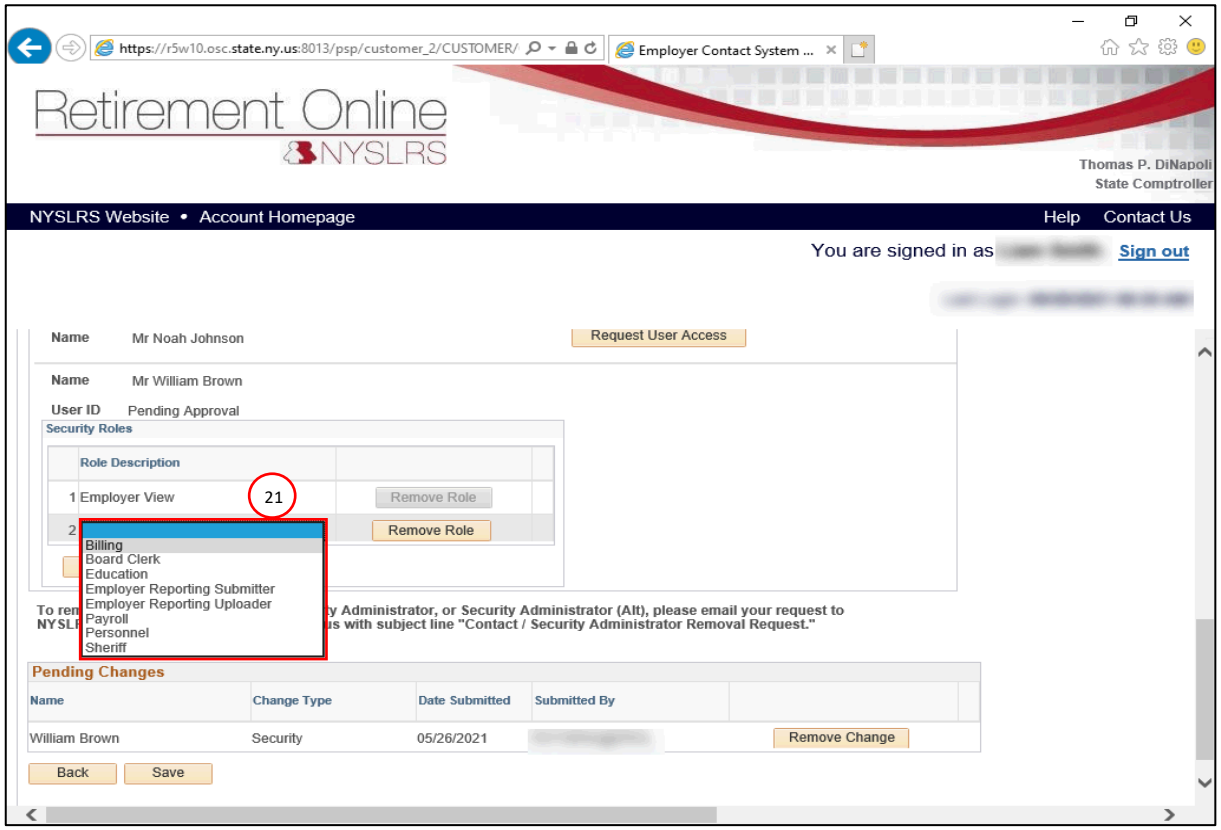
Step	Action
17.	The fields that populate will depend on the selection. Required fields are designated by an asterisk *. Click in the required fields and enter the appropriate information. **Note:** If a phone number is selected, please do not include parenthesis, dashes or slashes. This field will format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

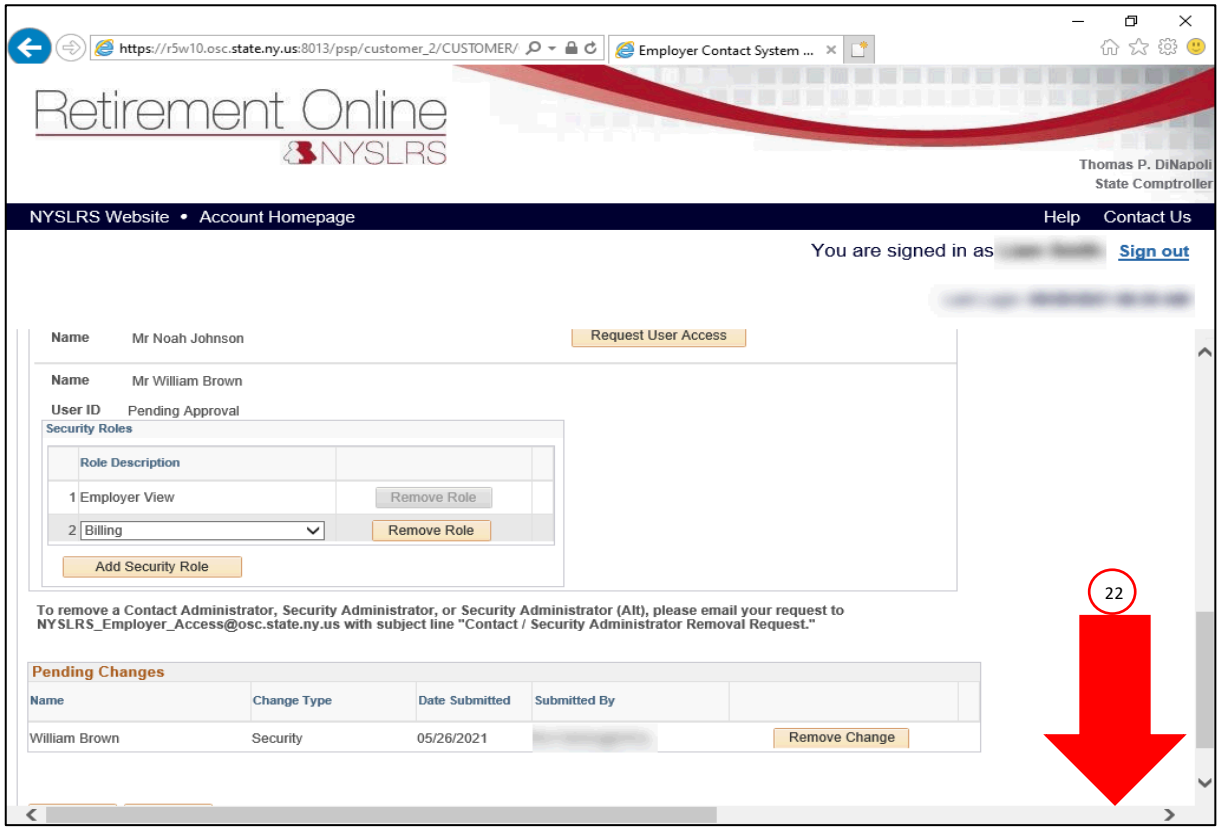


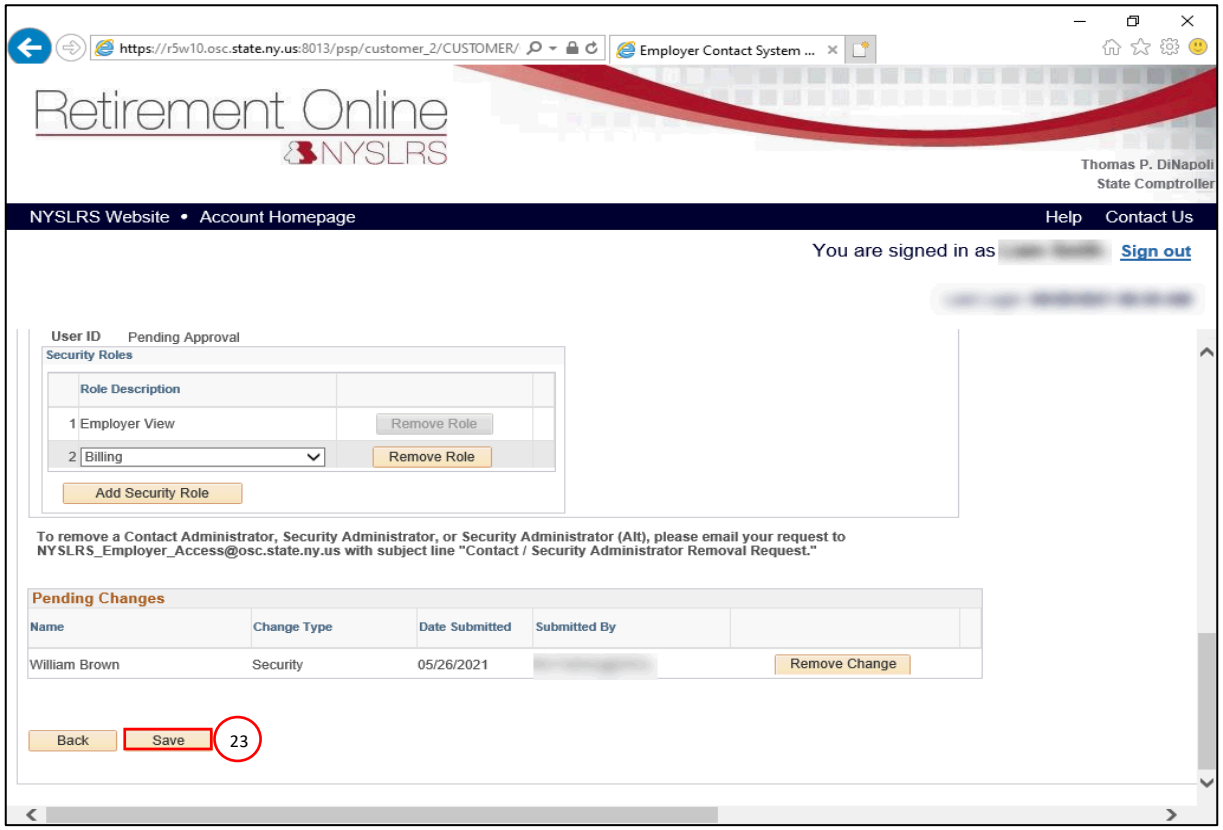
Step	Action	
19	You will return to the *Employer Retirement Online Access* page. You will see your request added to the page with a **User ID** of "Pending Approval". You will also see the change in the 'Pending Changes' section if it requires approval by Member and Employer Services Bureau. To add a 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. **Note:** If you do not need to add a security role, proceed to step 23.	

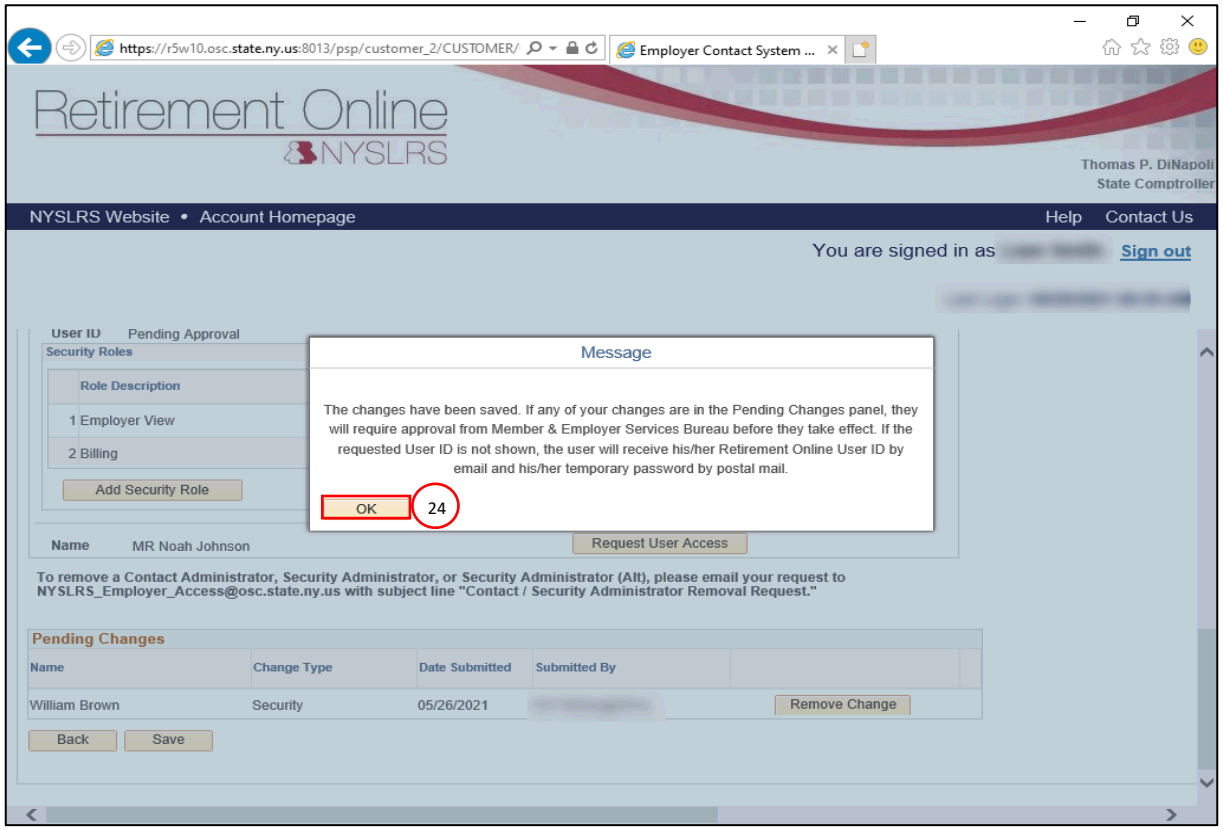
Step	Action	
20.	Click the **Add Security Role** button. Add Security Role	

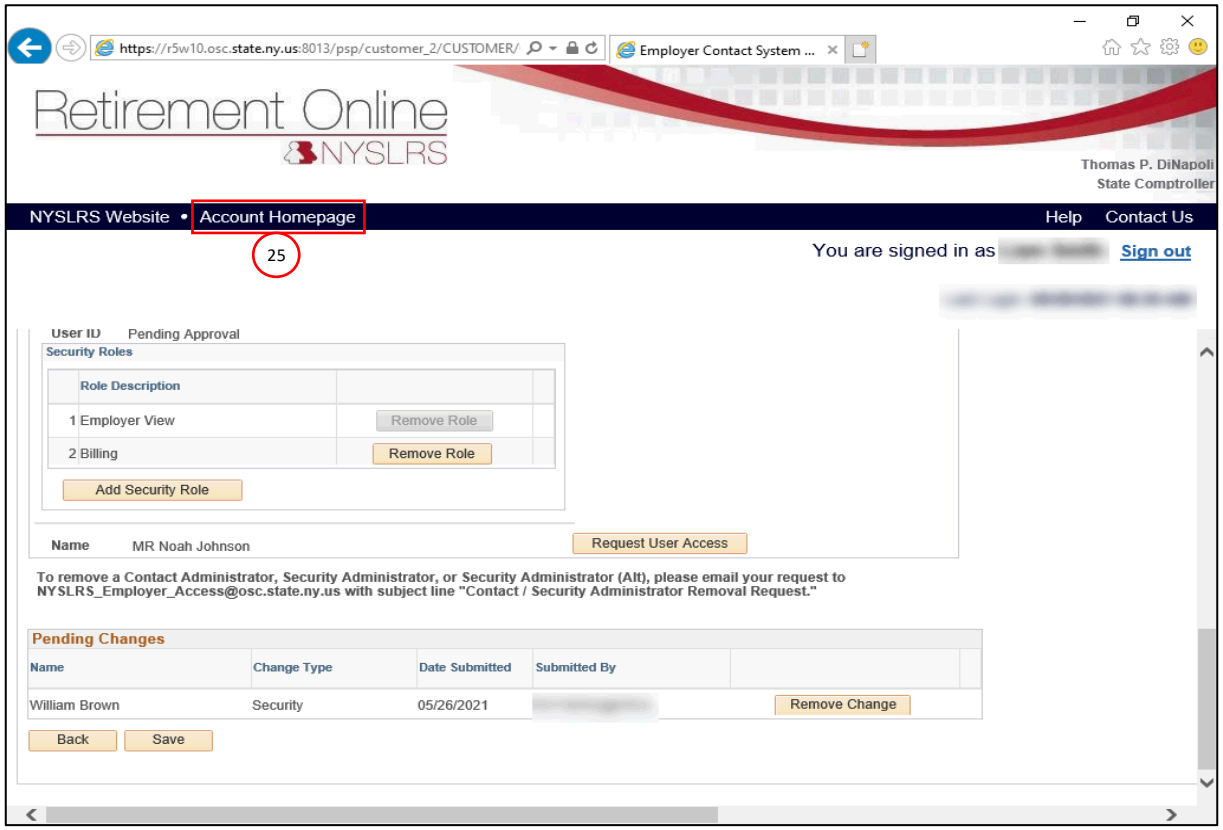
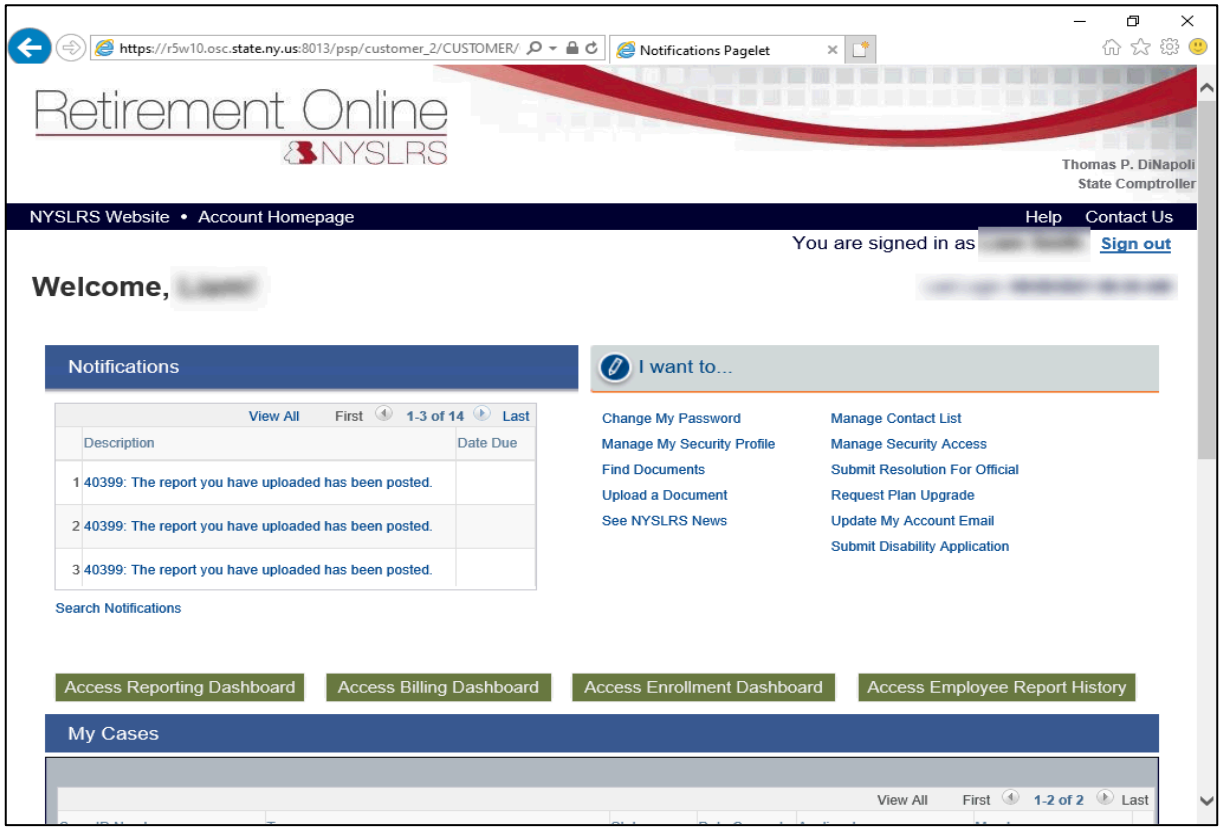
Step	Action
21	The security role drop-down will be populated with any roles available to each employer contact, and may look different for each contact. Select the drop-down to choose an option from the list. Billing **Note:** If you need to select additional roles for the employer contact, repeat steps 20 – 21. Continue this process until the employer contact has all the roles they need.



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

Step	Action	
23.	Click the **Save** button. Save	

Step	Action	
24	A 'Message' pop-up will appear. **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. After reviewing the information in the pop-up, click the **OK** button. OK	

Step	Action	
25.	Click the **Account Homepage** link to return to your *Retirement Online Account Homepage*. Account Homepage	

Step	Action	
26.	The *Retirement Online Account Homepage* will appear. You have successfully requested access and assigned security roles for an employer contact who does not have access to *Retirement Online*.