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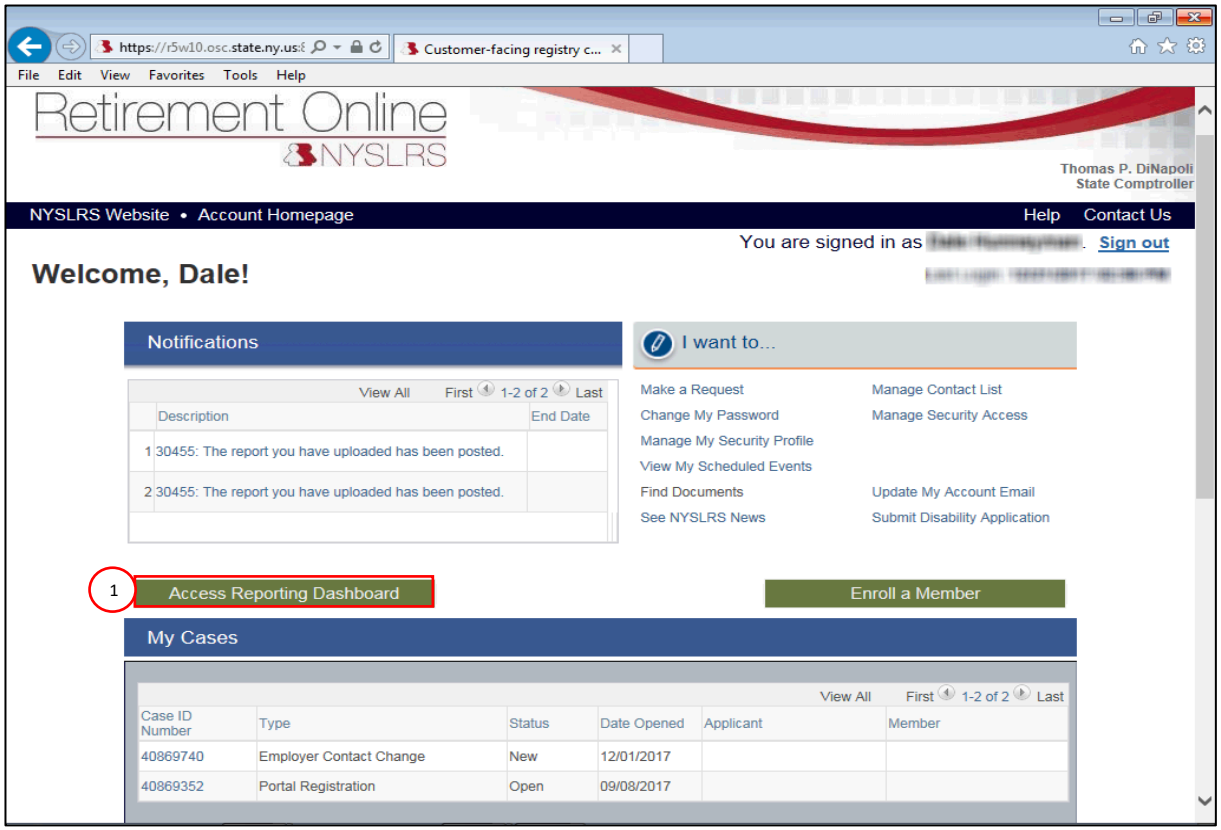
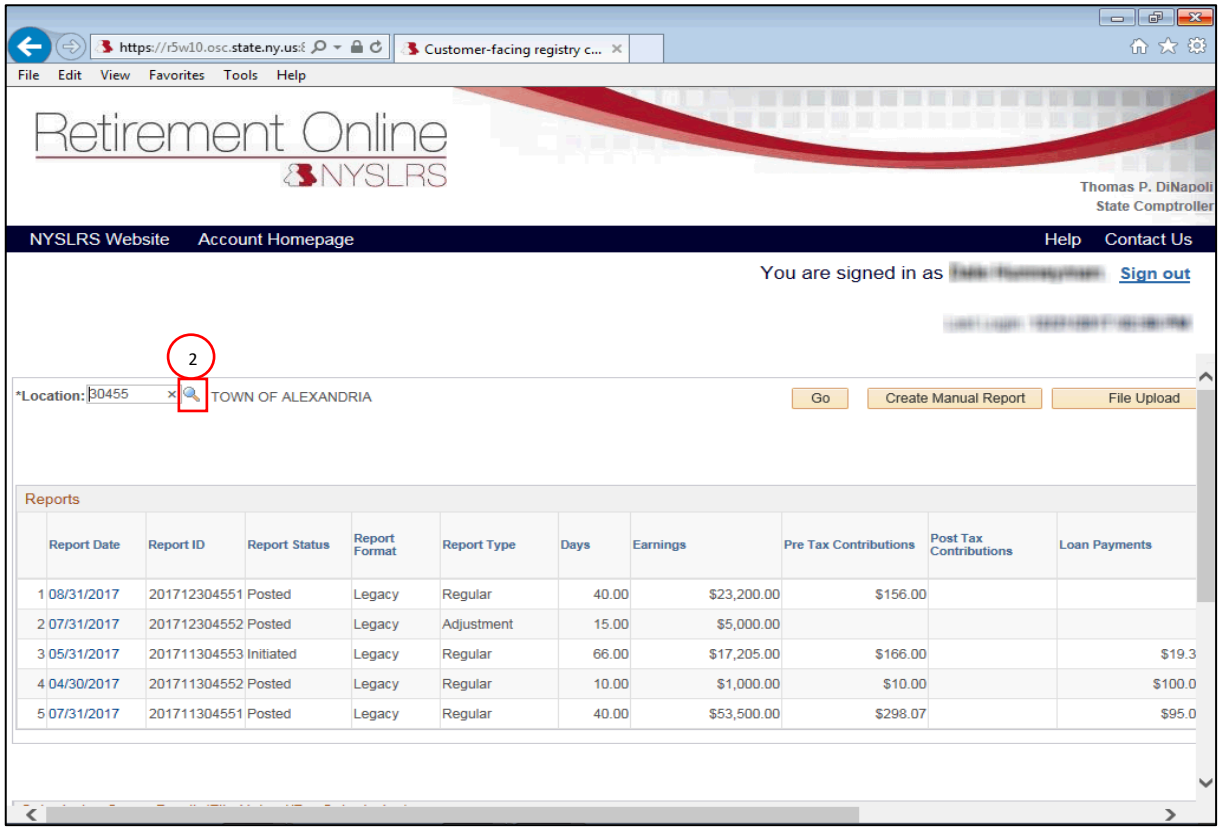
NYSLRS

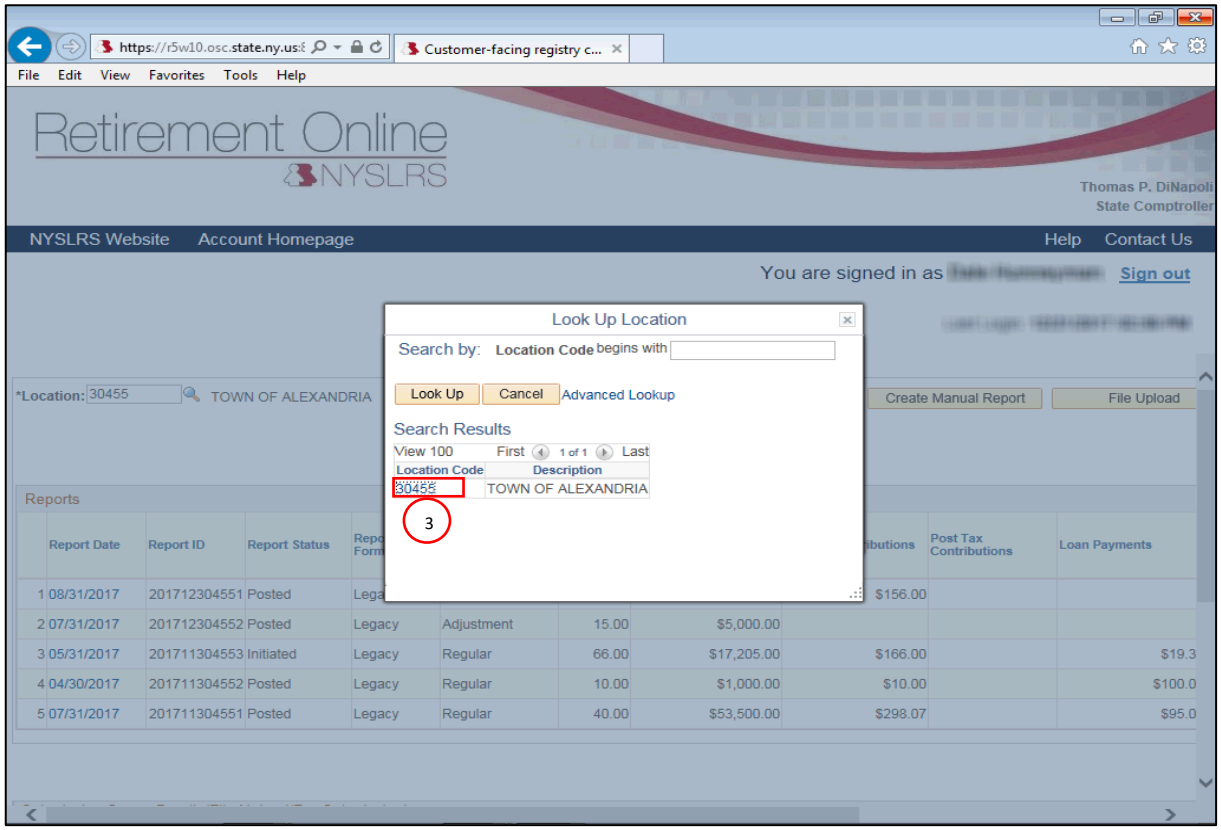
New York State & Local Retirement System

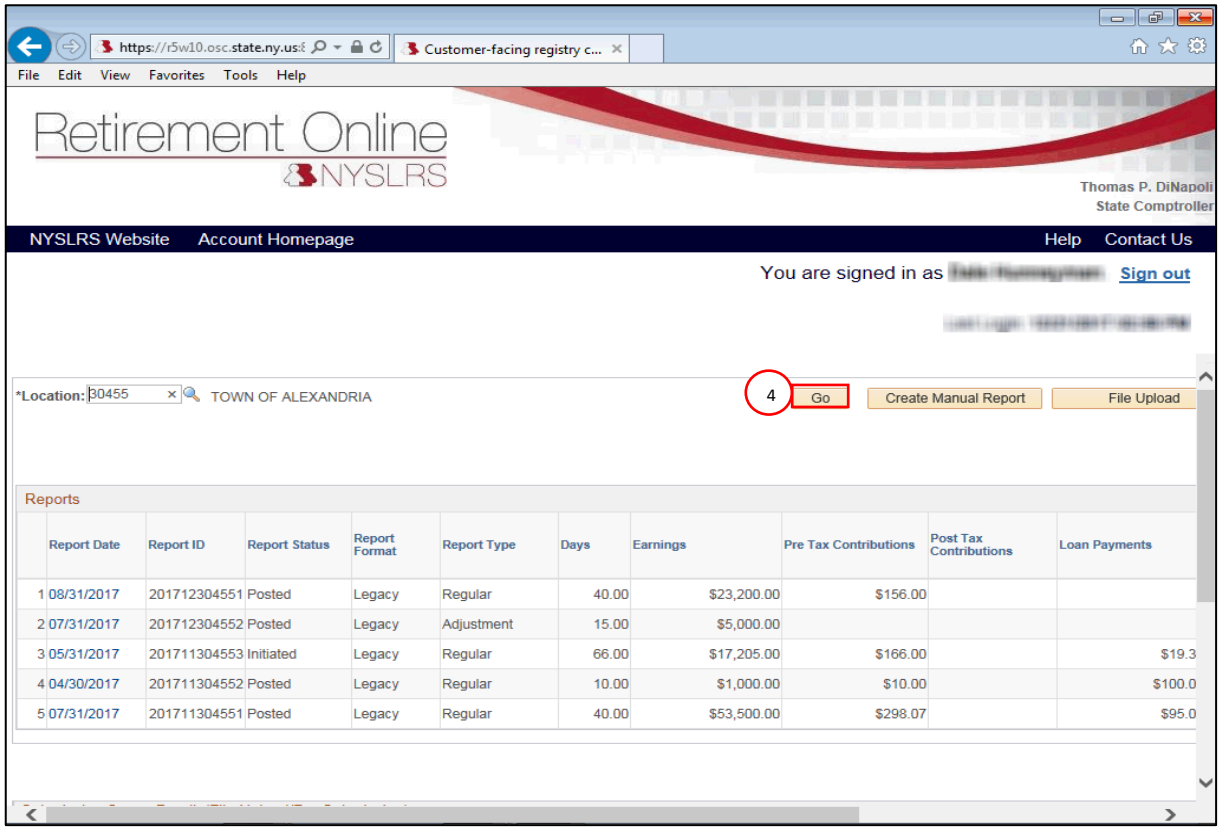
# Create a Manual Legacy Adjustment Report

This guide shows you (as an employer reporting submitter) how to create a manual adjustment report using the legacy reporting format within *Retirement Online*. You would use this report to edit an employee's total days or total earnings for a previously reported month.

| Step | Action | |
|---|---|---|
| 1. | On your *Retirement Online Account Homepage*, click the **Access Reporting Dashboard** button.<br>Access Reporting Dashboard |  |

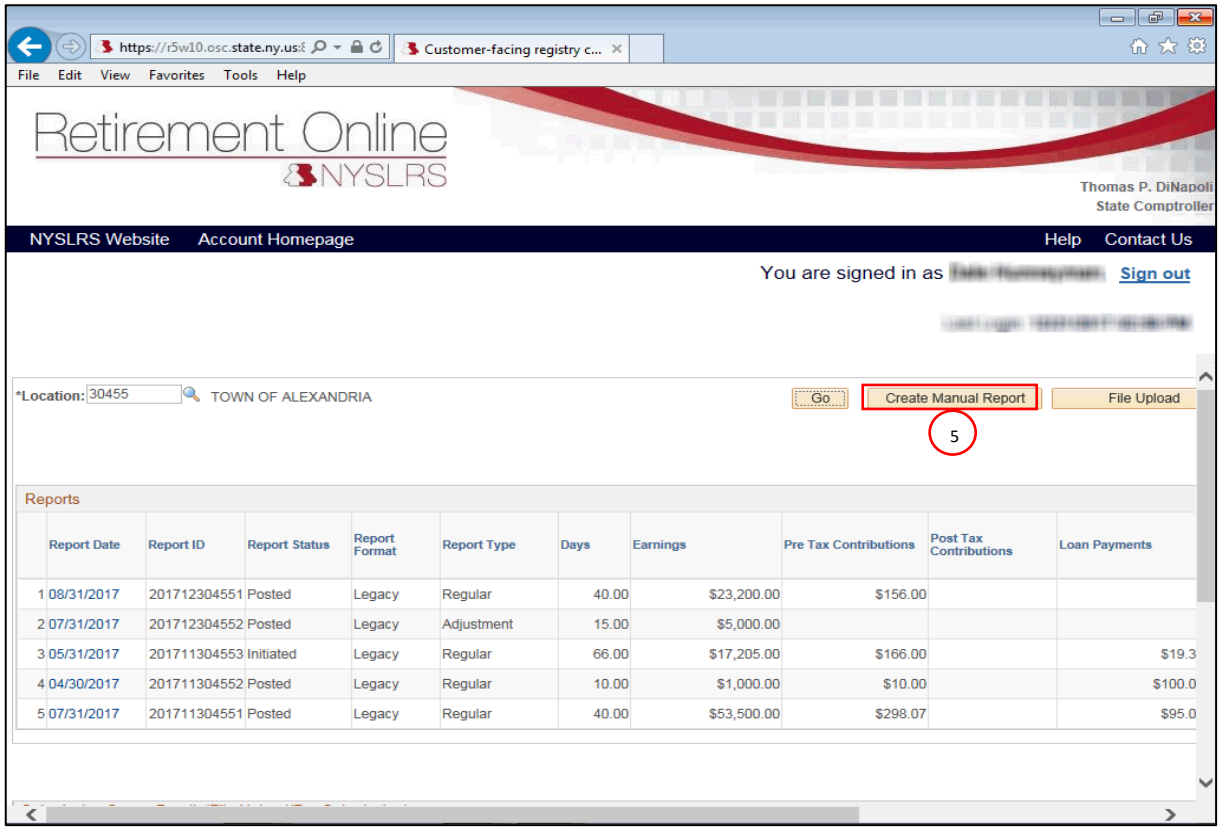
| Step | Action | |
|---|---|---|
| 2. | The *Employer Reporting Dashboard* page will appear. Select your Location. To view a list of all your available location codes, click the **Look Up** icon next to the **Location** field.<br><br>**Note:** If you have access to more than one location code, the location field will be blank. If you only have access to one location code, it will be entered automatically. |  |

| Step | Action | |
|---|---|---|
| 3. | The 'Look Up Location Code' pop-up will appear. Click the **Location Code** link for the location that you want to report.<br><br>**Note:** If you report for multiple locations, you will have more than one employer location listed. |  |

| Step | Action | |
|---|---|---|
| 4. | Click the **Go** button to bring up information related to the selected location code on the *Employer Reporting Dashboard* page.<br>Go |  |

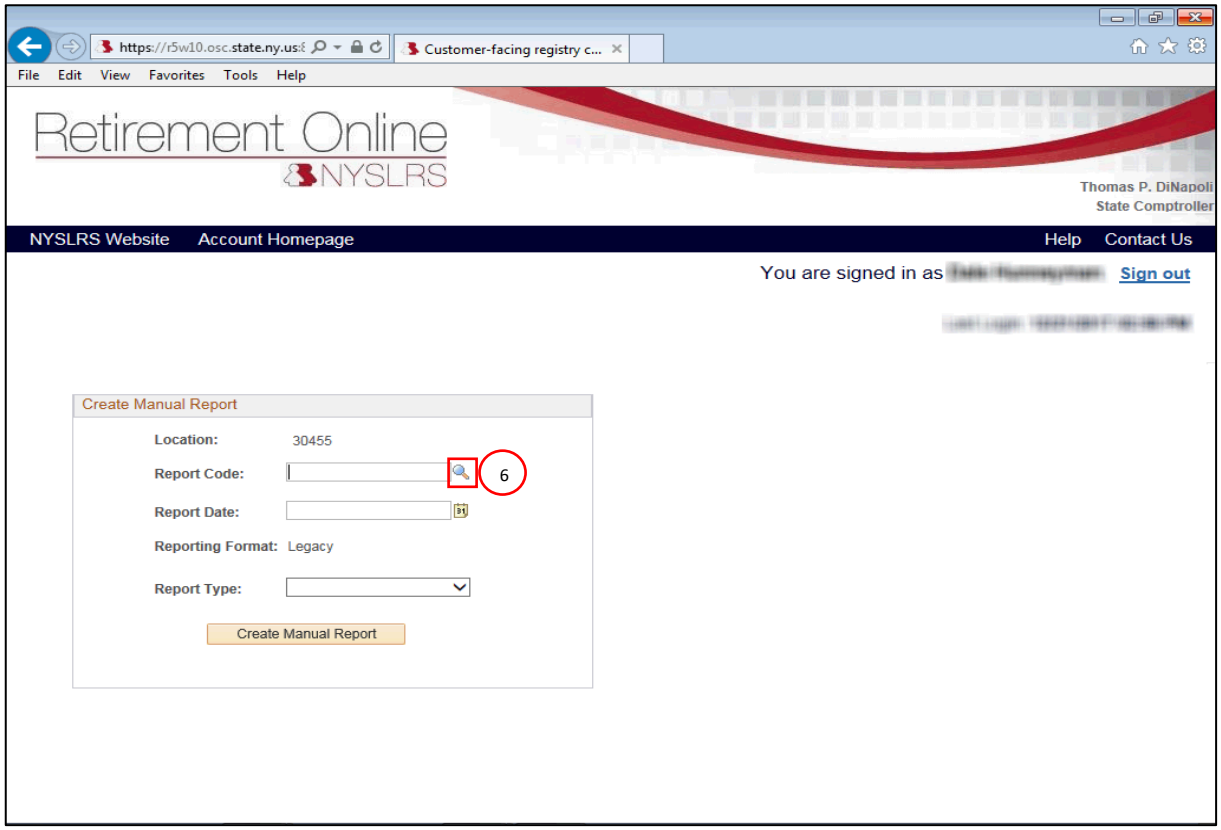


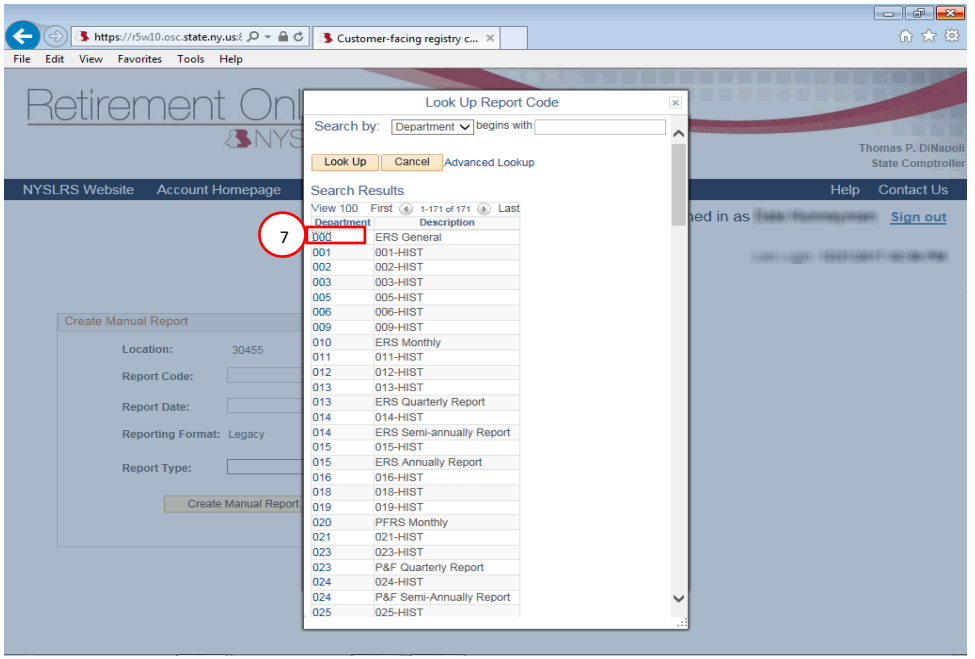
| | Report Date | Report ID | Report Status | Report Format | Report Type | Days | Earnings | Pre Tax Contributions | Post Tax Contributions | Loan Payments |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 08/31/2017 | 201712304551 | Posted | Legacy | Regular | 40.00 | $23,200.00 | $156.00 | | |
| 2 | 07/31/2017 | 201712304552 | Posted | Legacy | Adjustment | 15.00 | $5,000.00 | | | |
| 3 | 05/31/2017 | 201711304553 | Initiated | Legacy | Regular | 66.00 | $17,205.00 | $166.00 | | $19.3 |
| 4 | 04/30/2017 | 201711304552 | Posted | Legacy | Regular | 10.00 | $1,000.00 | $10.00 | | $100.0 |
| 5 | 07/31/2017 | 201711304551 | Posted | Legacy | Regular | 40.00 | $53,500.00 | $298.07 | | $95.0 |

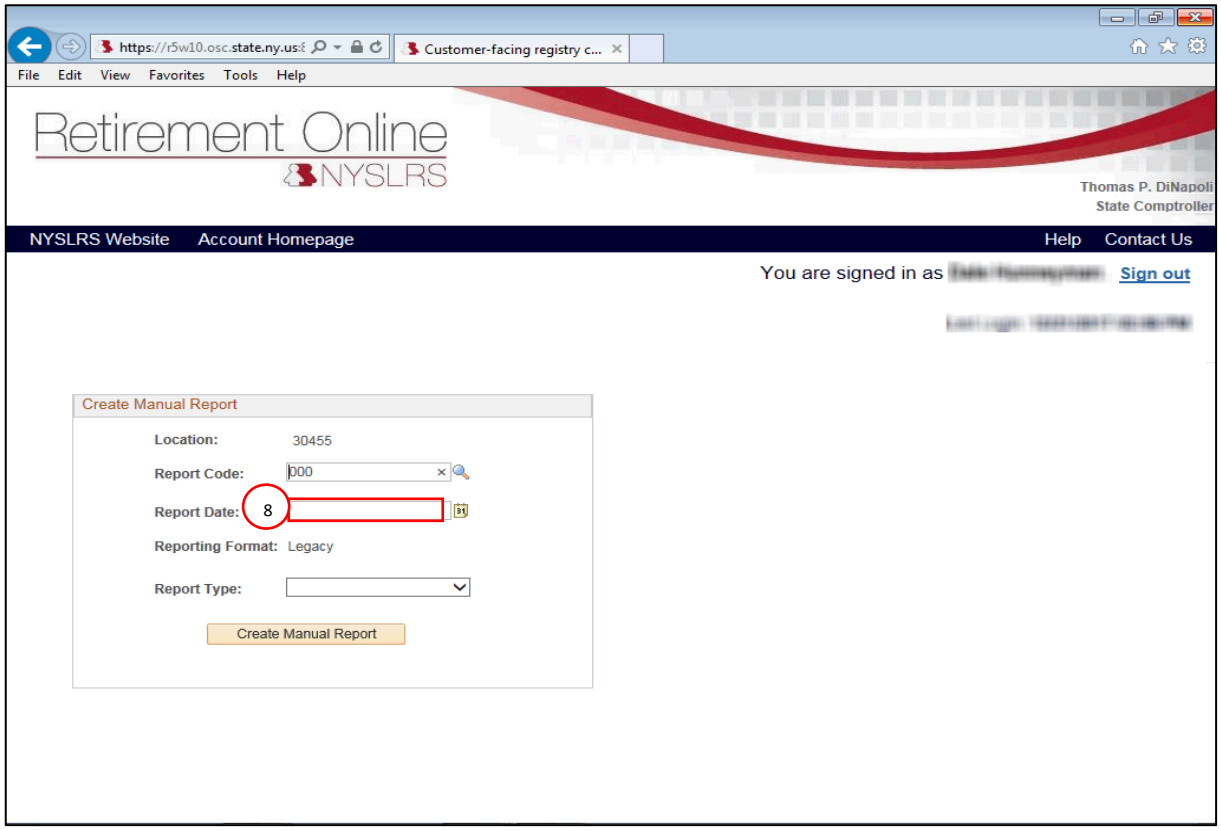
| Step | Action | |
|---|---|---|
| 5. | To create a report, click **Create Manual Report**.<br>Create Manual Report |  |

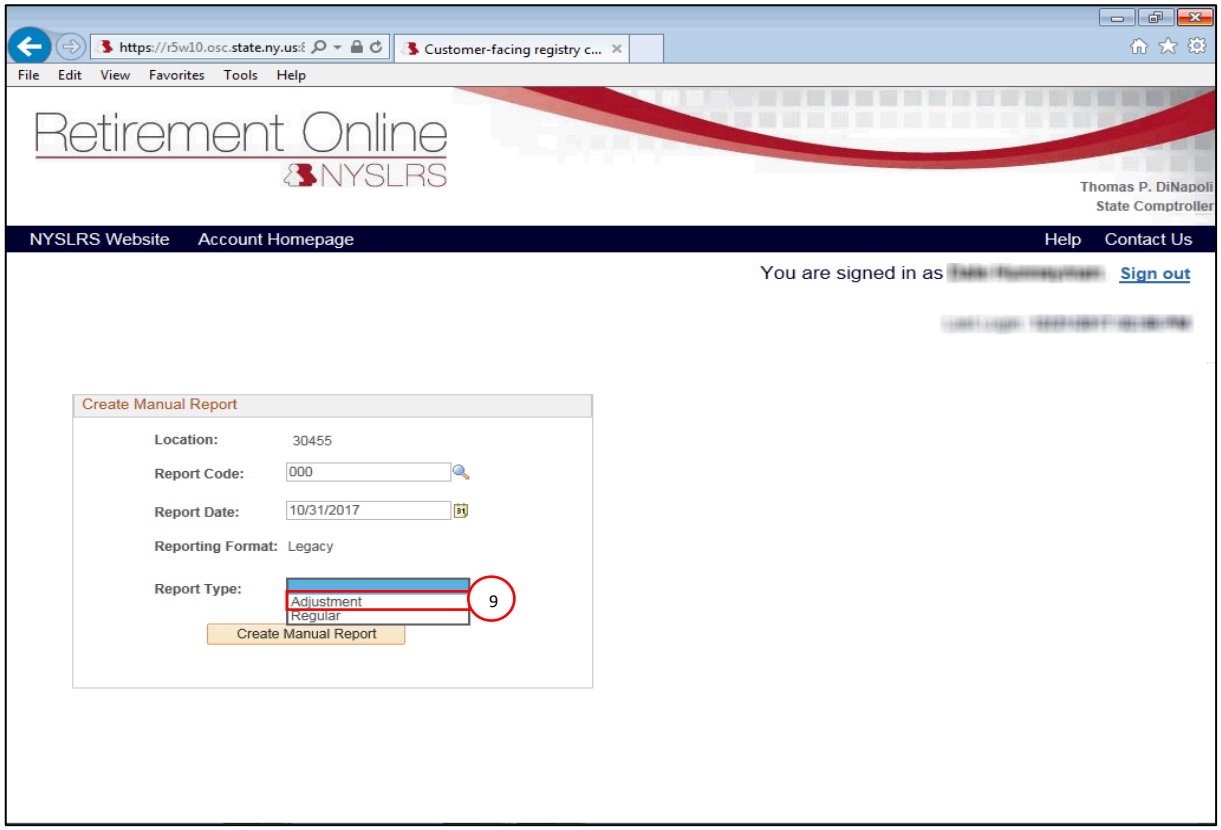


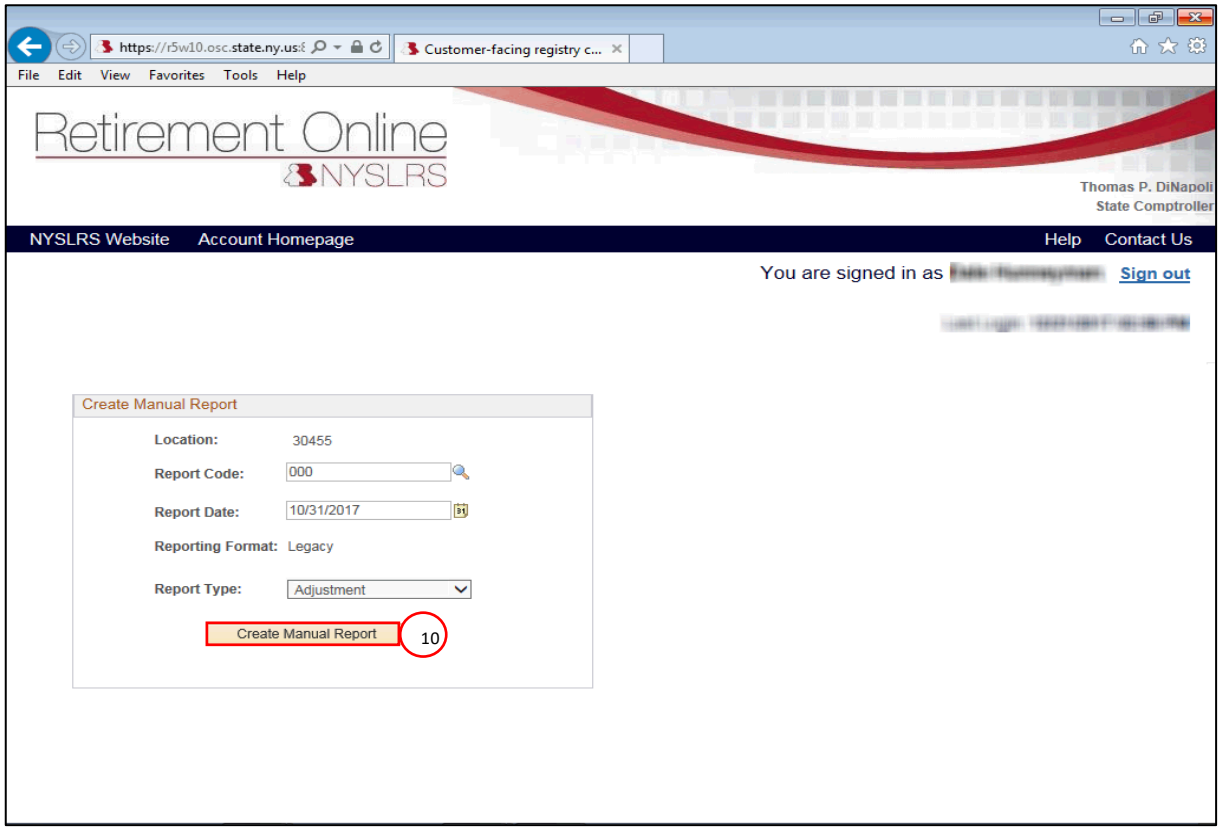
| | Report Date | Report ID | Report Status | Report Format | Report Type | Days | Earnings | Pre Tax Contributions | Post Tax Contributions | Loan Payments |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 08/31/2017 | 201712304551 | Posted | Legacy | Regular | 40.00 | $23,200.00 | $156.00 | | |
| 2 | 07/31/2017 | 201712304552 | Posted | Legacy | Adjustment | 15.00 | $5,000.00 | | | |
| 3 | 05/31/2017 | 201711304553 | Initiated | Legacy | Regular | 66.00 | $17,205.00 | $166.00 | | $19.3 |
| 4 | 04/30/2017 | 201711304552 | Posted | Legacy | Regular | 10.00 | $1,000.00 | $10.00 | | $100.0 |
| 5 | 07/31/2017 | 201711304551 | Posted | Legacy | Regular | 40.00 | $53,500.00 | $298.07 | | $95.0 |

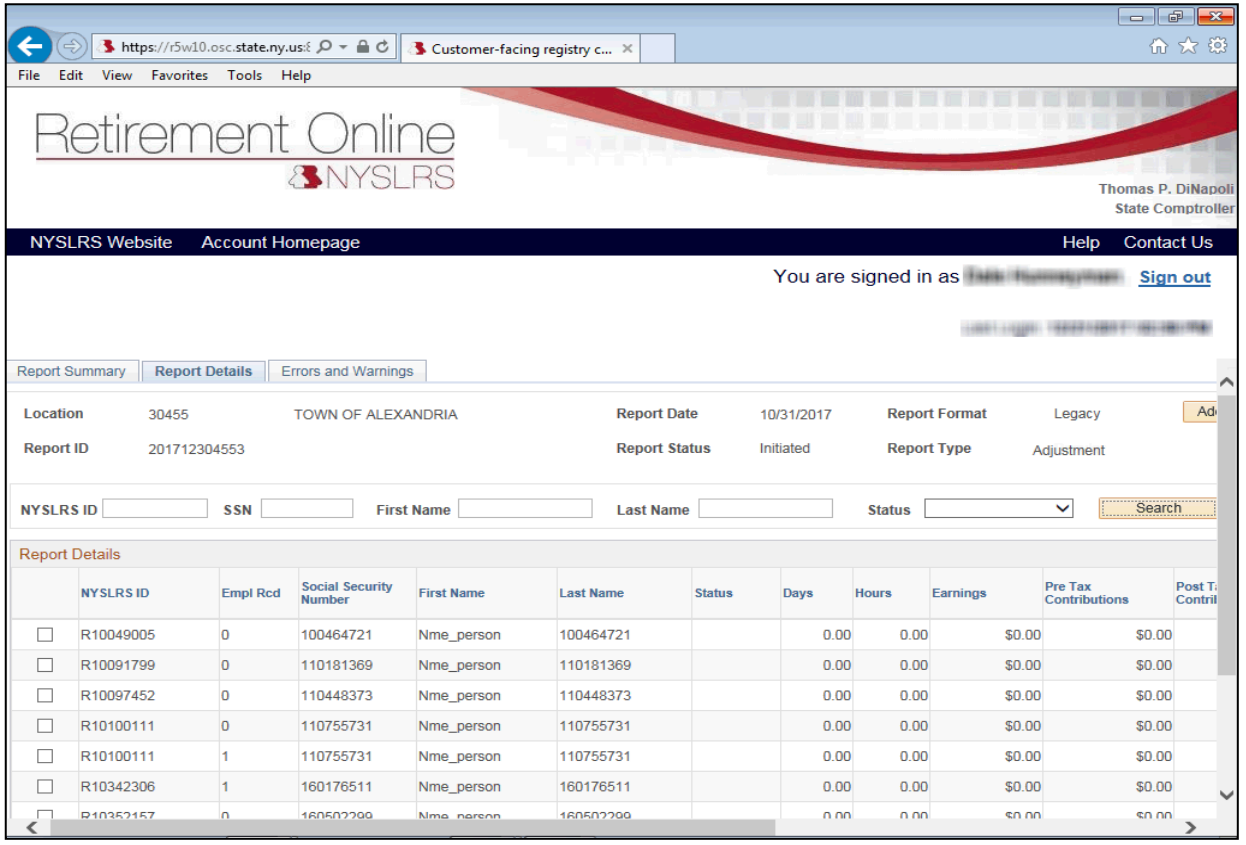
| Step | Action | |
|---|---|---|
| 6. | The *Create Manual Report* page will appear. The Location Code will carry over from the *Employer Reporting Dashboard* page. Click the **Look Up** icon next to the **Report Code** field. |   |

| Step | Action | |
|---|---|---|
| 7. | A 'Look Up Report Code' pop-up box will appear. Click the **Report Code** link. |  |

| Step | Action | |
|---|---|---|
| 8. | Click in the **Report Date** field and enter the Report Date using the MM/DD/YYYY format.<br><br>**Note:** You can also use the **Choose a Date** icon. |  |

| Step | Action | |
|---|---|---|
| 9. | The **Report Format** defaults to "Regular." Select the **Report Type** drop-down field to select the report type.<br><br>**Note:** There are two options in this drop-down list: Adjustment or Regular. |  |

| Step | Action | |
|---|---|---|
| 10 | Once you have filled in all required fields, click **Create Manual Report**.<br>Create Manual Report |  |

| Step | Action | |
|---|---|---|
| 11 | The *Report Details* Page will appear. All active employees for your organization will be listed here.<br><br>The next step will be to add the earnings and contributions details for each employee that requires adjustment, which can be found in the Enter Data for a Manual Monthly Legacy Report guide.<br><br>You have successfully completed creating a manual legacy adjustment report. |  |



| NYSLRS ID | Empl Rcd | Social Security Number | First Name | Last Name | Status | Days | Hours | Earnings | Pre Tax Contributions |
|---|---|---|---|---|---|---|---|---|---|
| R10049005 | 0 | 100464721 | Nme_person | 100464721 | | 0.00 | 0.00 | $0.00 | $0.00 |
| R10091799 | 0 | 110181369 | Nme_person | 110181369 | | 0.00 | 0.00 | $0.00 | $0.00 |
| R10097452 | 0 | 110448373 | Nme_person | 110448373 | | 0.00 | 0.00 | $0.00 | $0.00 |
| R10100111 | 0 | 110755731 | Nme_person | 110755731 | | 0.00 | 0.00 | $0.00 | $0.00 |
| R10100111 | 1 | 110755731 | Nme_person | 110755731 | | 0.00 | 0.00 | $0.00 | $0.00 |
| R10342306 | 1 | 160176511 | Nme_person | 160176511 | | 0.00 | 0.00 | $0.00 | $0.00 |