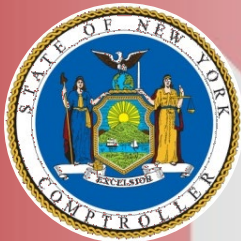# NYS Association of Counties County Finance School

Retirement System Updates
and Enhanced Reporting Transition

May 2, 2024

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NYSLRS
New York State & Local Retirement System
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Agenda

New York State and Local Retirement System

- About NYSLRS/General Update
- New Legislation

Retirement Online Update

- Member Self Service Portal
- Employer Reporting Highlights
- Employer Enhanced Reporting & Gold Certification Process
- Appendix: Additional Enhanced Reporting Details for Transitioning Employers

New York State and Local Retirement System

NYSLRS is a Defined Benefit Plan

Fixed pension guaranteed for life, determined by:

SERVICE CREDIT

×

FINAL AVERAGE EARNINGS

×

a PLAN FORMULA

NOT a Defined Contribution Plan

Contributions accrued during employment, but no guarantees

NYSLRS is a Qualified Plan

Research by the National Institute on Retirement Security (NIRS)

- Working age Americans are increasingly worried about retirement and they see a return to pensions as a way to restore the American Dream of retirement.

- All generations have favorable views of defined benefit pensions, with Millennials holding the most favorable views.

- Recent survey: The majority of public workers (86%) cited retirement benefits as a major reason they stay in their jobs.

- Most Americans agree that public employees should receive pensions because workers contribute to the cost and these benefits help compensate for lower pay and risks of some jobs

New York State & Local Retirement System

Two Retirement Systems

2,979 Participating Employers

327 Plan Combinations

1,210,133 Members, Retirees and Beneficiaries

695,504 Members
514,629 Retirees and Beneficiaries

Value of the Fund:
$248.5 billion
as of March 31, 2023

Membership by Tier
(3/31/23)

Tier	ERS	Percentage	PFRS	Percentage	Total
Tier 1	873	0.1%	13	-	886
Tier 2	847	0.1%	15,508	43.4%	16.355
Tiers 3 & 4	242,418	36.7%	121	0.3%	242,539
Tier 5	29,490	4.5%	1,828	5.1%	31,318
Tier 6	386,123	58.5%	18,284	51.1%	404,407
Total	**659,751**	**100.0%**	**35,754**	**100.0%**	**695,505**

Membership by Employer Type (3/31/23 Active & Inactive)

Government Type	ERS	PFRS	Total
State	206,788	6,689	213,477
Counties	107,865	5,510	113,375
Cities	19,772	11,824	31,596
Towns	49,771	4,195	53,966
Villages	16,184	4,215	20,399
Miscellaneous	108,106	3,321	111,427
School Districts	151,265	–	151,265
Total	**659,751**	**35,754**	**695,504**

Average Salary by Employer Type (3/31/2023)

Government Type	ERS	PFRS
State	$ 75,995	$ 130,542
Counties	$ 62,711	$ 157,281
Cities	$ 56,607	$ 104,529
Towns	$ 49,357	$ 115,787
Villages	$ 49,680	$ 107,891
Miscellaneous	$ 68,166	$ 140,414
School Districts	$ 36,921	N/A

Benefits Paid to
NYSLRS Retirees and Beneficiaries

FY 2022-23 NYSLRS paid $15.5 billion in Benefits

Average ERS Pension

- All Retirees/Beneficiaries   **$27,227**
- FY 2022-23 Retirees/Beneficiaries   **$32,267**

Average PFRS Pension

- All Retirees/Beneficiaries   **$60,592**
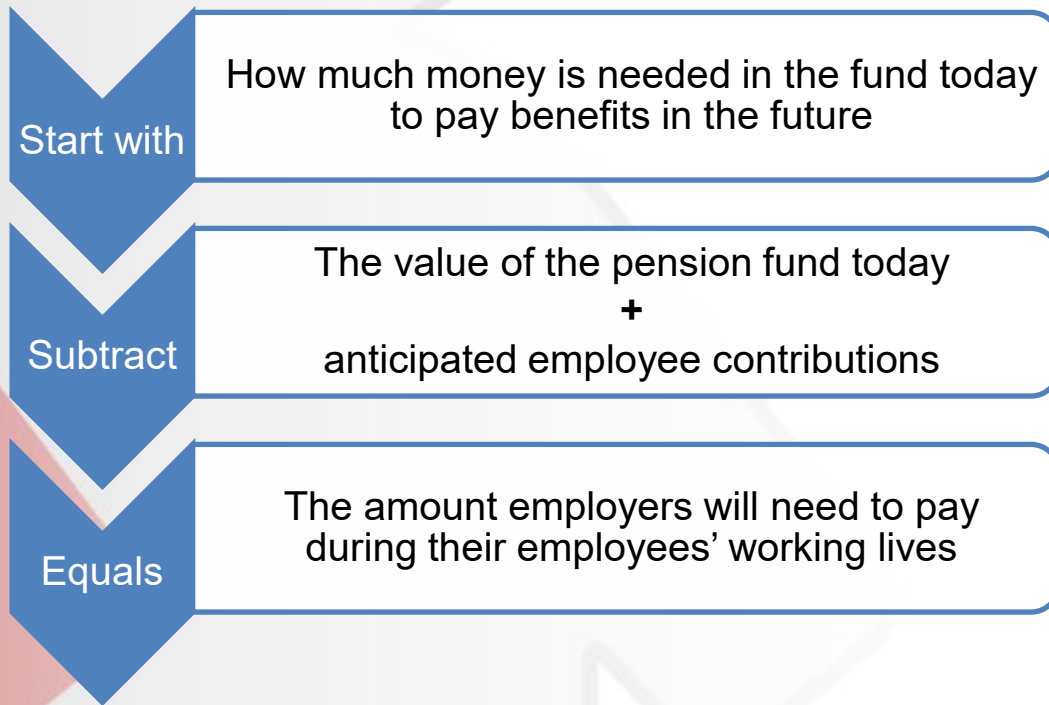- FYE 2022-23 Retirees/Beneficiaries   **$87,633**

How Pensions Are Funded*

24¢
Employer
Contributions

2¢
Employee
Contributions

74¢
Investment
Earnings

*Numbers may not add up to 100 percent due to rounding.
NYS pensions paid April 1, 2003 – March 31, 2023

How the Actuary Sets Employer Rates: The Future Value of Benefits

Start with
How much money is needed in the fund today to pay benefits in the future

Subtract
The value of the pension fund today
+
anticipated employee contributions

Equals
The amount employers will need to pay during their employees' working lives

How the Actuary Sets Employer Rates: The Future Value of Benefits

The Actuary uses long-standing actuarial methods to make economic and demographic assumptions to estimate the cost to pay all current and future benefits.

Some of those assumptions include:

Future salary
and service amounts

Probabilities of retirements
and withdrawals

Life expectancies

How the Actuary Sets Employer Rates

Rates are set by tier/plan, since different plans provide different benefits.

Each employer pays based on rates for plans the employer has chosen to offer its employees.

How the Actuary Sets Employer Rates - The Assumed Rate of Return

- The assumed rate of return is a critical factor for calculating the present value of benefits and employer contribution rates.

- The law requires the Actuary to recommend an assumed rate of return on investments at least every five years.

  - The recommendation is based on investment returns and forecasts of economic growth, inflation and interest rates.

- Assumed rate of return was lowered to **5.9%** in 2021 and first affected contribution rates for FY 2023.

Employers' Pension Contribution Rates FY 2024

- The value of the Fund as of **March 31, 2022** was $272.1 billion with an overall return of 9.51 percent.

- Higher investment returns were not enough to offset other factors pushing rates higher:

  - Higher salaries and COLA, benefit and mortality improvements

- Employer contribution rates increased for FY 2024.

  - Average ERS contribution increased 1.5% to **13.1%** of payroll.
  - Average PFRS contribution increased 0.8% to **27.8%** of payroll.

Employers' Pension Contribution Rates Fiscal Year 2025

- The value of the Fund as of **March 31, 2023** was $248.5 billion with an overall return of -4.14 percent.

- Employer contribution rates will increase for FY 2025:
  - Average ERS contribution will increase 2.1% to **15.2%** of payroll.
  - Average PFRS contribution will increase 3.4% to **31.2%** of payroll.

- The long-term assumed rate of return remained 5.9 percent.

Common Retirement Fund

Total Value of Fund
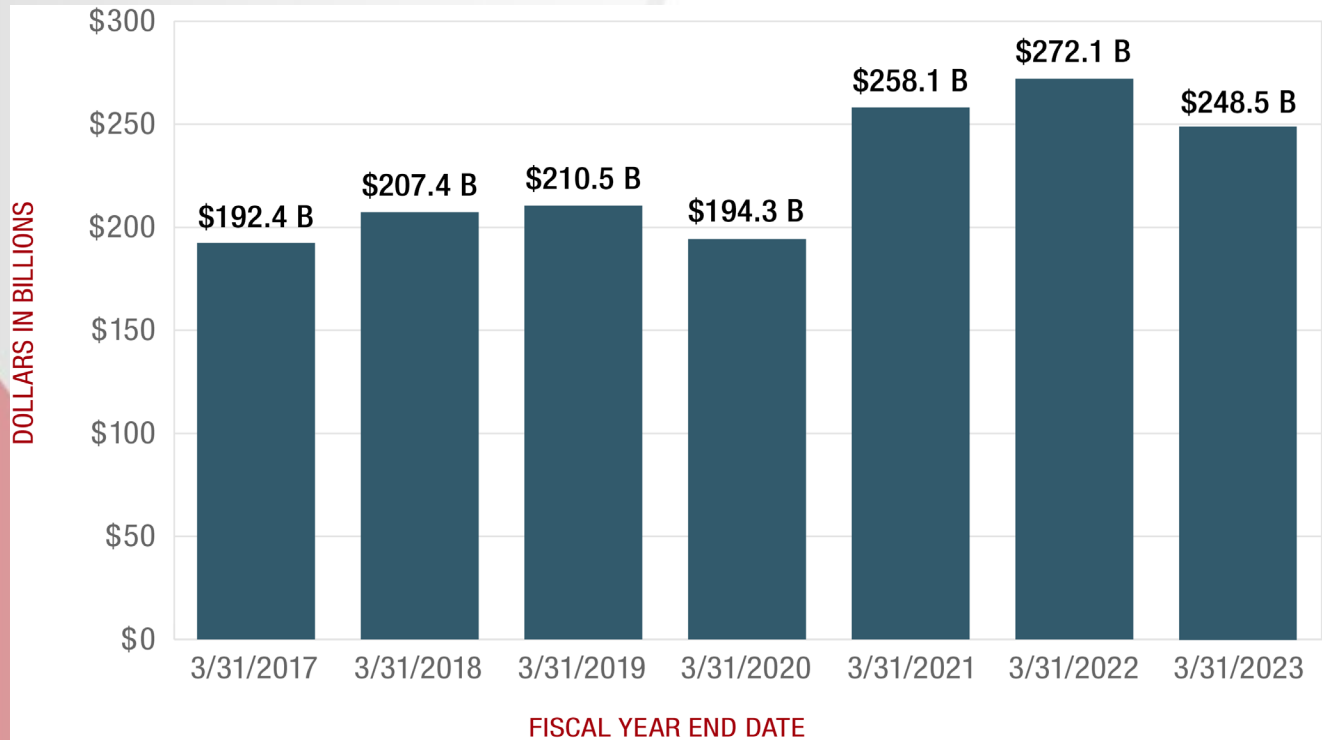
Fund assumes a 5.9% long-term rate of return
(no change in assumed rate, effective for 2023 valuation)

Common Retirement Fund

Annual Return on Investments

Rate of Return

Year	Value
2012	6.0%
2013	10.4%
2014	13.0%
2015	7.2%
2016	0.19%
2017	11.48%
2018	11.35%
2019	5.23%
2020	- 2.68%
2021	33.55%
2022	9.51%

Historical Employer Contribution Average Rate Trend

Year	Average Rate	
	ERS	PFRS
1977	19.6	33.3
1978	19.8	34.9
1979	18.8	35.1
1980	18.1	34.2
1981	17.0	33.1
1982	15.5	29.6
1983	15.1	28.7
1984	14.4	27.3
1985	14.2	26.5
1986	10.4	19.8
1987	9.4	13.3
1988	9.7	14.8
1989	3.7	8.5
1990	3.6	8.3
1991	0.3	7.8
1992	0.4	11.5
1993	0.6	14.0

Year	Average Rate	
	ERS	PFRS
1994	0.7	11.3
1995	0.7	13.9
1996	2.2	13.0
1997	3.7	9.8
1998	1.7	7.0
1999	1.3	2.4
2000	0.9	1.9
2001	0.9	1.6
2002	1.2	1.6
2003	1.5	1.4
2004	5.9	5.8
2005	12.9	17.6
2006	11.3	16.3
2007	10.7	17.0
2008	9.6	16.6
2009	8.5	15.8
2010	7.4	15.1

Year	Average Rate	
	ERS	PFRS
2011	11.9	18.2
2012	16.3	21.6
2013	18.9	25.8
2014	20.9	28.9
2015	20.1	27.6
2016	18.2	24.7
2017	15.5	24.3
2018	15.3	24.4
2019	14.9	23.5
2020	14.6	23.5
2021	14.6	24.4
2022	16.2	28.3
2023	11.6	27.0
2024	13.1	27.8
2025	15.2	31.2

Historical Employer Contribution Average Rate Trend
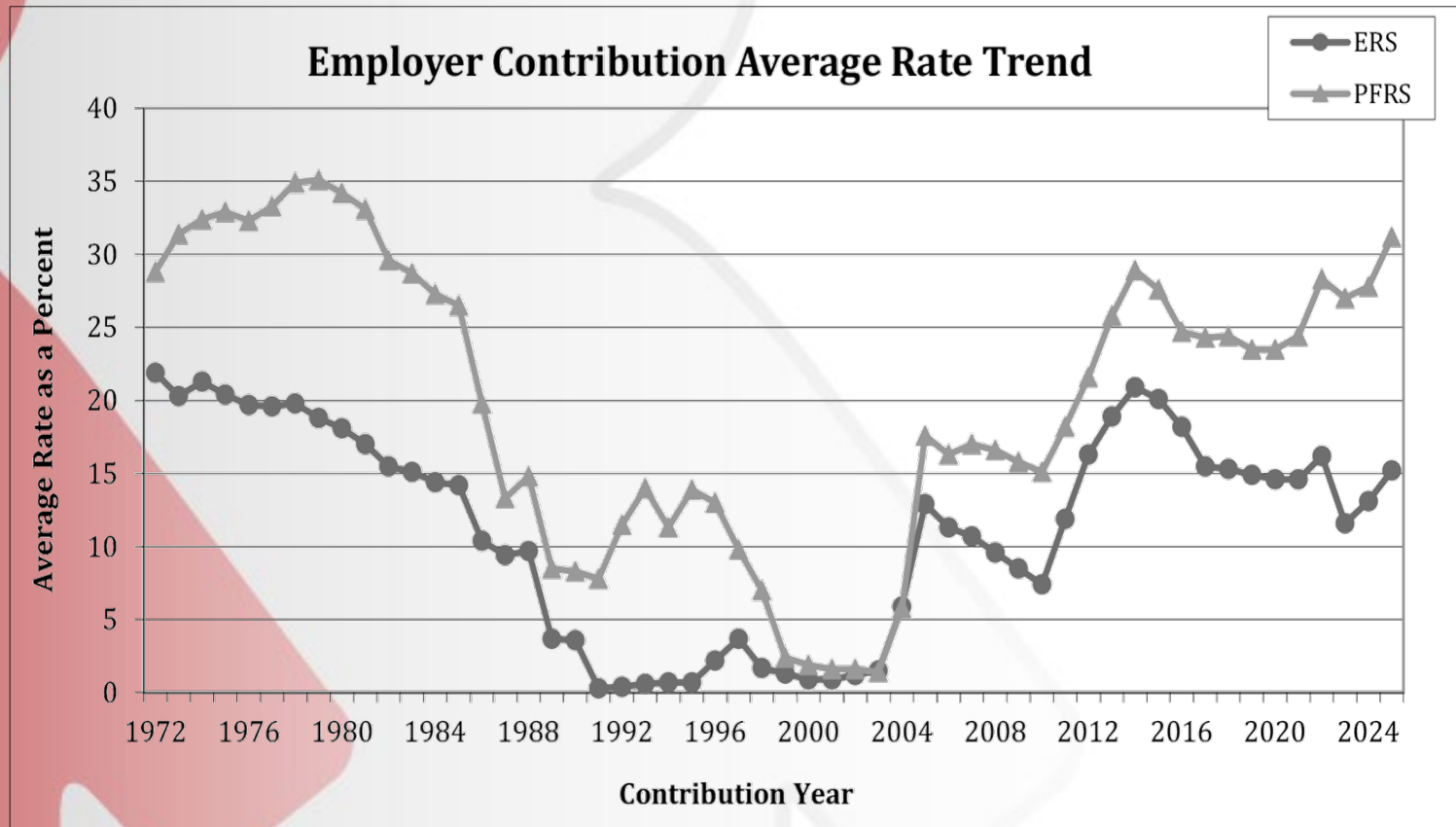
Legislative Updates Impacting NYSLRS Members

April 2022 through April 2024

- April 9, 2022: Vesting change for Tiers 5 and 6 from 10 years to 5 years

    - **NEW: Effective April 1, 2024. Tier 6 benefit calculation changes from 5 years FAE to 3 years FAE. Salary earned in any year cannot exceed the average of the previous 2 years by more than 10%**

- 2022: Overtime earnings during COVID-19 were temporarily excluded from the annual wage used to calculate Tier 6 contribution rates from 4/1/22 – 3/31/24.

    - **NEW: applied to contribution rates 4/1/24 to 3/31/26**

- Legislation suspended the retiree earnings limit for school districts and BOCES through June 30, 2024.

    - **NEW: extended through June 30, 2025**

- COVID-19 Accidental Death Benefit – Chapter 783 of the Laws of 2022 extends the benefit from 12/31/22 until 12/31/24.

Retirement Online

Member Self-Service

Member/Retiree Retirement Online

Previously Released Options

- ✓ Update Personal and Contact Information
- ✓ Manage Member Beneficiary Designation
- ✓ Apply for a Loan
- ✓ Apply for a Hearing
- ✓ View Status of Open Cases
- ✓ Income Verification Letters

- ✓ Generate Benefit Estimates
- ✓ Purchase Service Credit
- ✓ Apply for Service Retirement
- ✓ Manage Payments
- ✓ Withdraw from Membership
- ✓ View Correspondence
- ✓ Member Annual Statement

January 2023

- ✓ View Payment Check
- ✓ Update Direct Deposit Information
- ✓ Update Tax Withholdings

January 2024

- ✓ 1099-R View & Reprint
- ✓ Choose Tax Form Delivery Method

- ✓ February 2024: Self-report Post-Retirement Employment

Member Retirement Online Activity Highlights

Case Types	Total ROL Cases in 2022	Total ROL Cases 1/1/2023 - 12/31/2023	Total ROL Cases since Roll out through 4/8/2024
Registrations	69,481	69,895	562,886
Loans	31,012	22,982	187,743
Beneficiary Updates (Pre)	25,015	26,041	168,149
Beneficiary Updates (Post)	4,047	4,713	
Demographic Updates	48,818	44,160	291,243
Benefit Estimates	371,803	403,402	1,182,040
Service Retirements	11,933	10,874	48,598
Change Loan Deduction	3,396	3,793	14,793
Service Credit Purchase Apps Set up SCP Deductions	3,457 1,587	4,063 1,836	14,303 6,643
Tier Reinstatement Requests	1,236	1,468	4,870

Encourage Your Employees to Register for Retirement Online

https://web.osc.state.ny.us/retire/retirement_online/marketing_toolkit/index.php

Use the materials in our **marketing toolkit** to help spread the word about Retirement Online.

Retirement Online

Employer Reporting

Supported Web Browsers & Session Integrity

Retirement Online works best when using

- Google Chrome
- Microsoft Edge Chromium
- Internet Explorer is no longer a recommended browser due to its phase out by Microsoft.

Security Tips on Cache Clearing:

- System improvements were made that reduced login errors and maintained the session integrity for a better user experience.
- Clearing cache ensures pages load correctly when changes are made.
- Best practice tips to reduce the need for clearing the browser cache are available online and from Help Desk.
- Do NOT use the back button

System Session Integrity

Security Tips on browser tabs:

- To keep secure information safe, we only allow one user login session to exist at a time.

- For convenience, Retirement Online frequently opens additional tabs whenever links are clicked to access other pages and features.

- This makes it possible to briefly view multiple pages at the same time.

System Access and Security

System Administrators: With Retirement Online, your Contact Administrators and Security Administrators work together to determine who uses the system at your location and what tasks will be available to them based on their role(s) at your organization. ***Please Review and update regularly.***

Forms are now available online if these roles need to be updated at your location.

A security feature that also provides convenience while protecting sensitive information:

- *System Access* as a contact type allowing a contact to be added using a more generic name while enabling them to receive a security role to work in Retirement Online.

Retirement Online Notifications

- Notifications and correspondence are sent based on the security roles assigned

  ✓ Consider assessing security roles for your staff and limiting access to those who need the information

  ✓ Details regarding which security roles receive notifications/correspondence, can be found at https://osc.state.ny.us/retire/retirement_online/word_and_pdf_documents/local-roles.pdf

Retirement Online Notifications Tool

- NYSLRS has created a tool to detail the notifications employers see on their dashboard

- As we improve our notifications, we will keep this tool up-to-date

- Access the notifications tool at this link: https://osc.state.ny.us/retire/retirement_online/notifications.php

- Powerful Search Tool added

New for Employers

Improvements to Loan/SCP Deduction Information:
(Released in October 2023)

- All deduction information in one convenient location.

- Separate tabs for Loan, SCP and Deficiencies.

- Inclusion of balance when there are six or less deductions remaining.

- Frequency of notifications reduced.

Ongoing deduction balances with greater than six remaining payments are considered confidential information and will not be displayed.

Loan	SCP	Deficiency (SCP)

Find | View All | 🔲 | 🔲   First ◀ 1-10 of 13 ▶ Last

NYSLRS ID	Reg. Number	Name	Location	Empl Record	Retirement System	Pay Frequency	Loan Deduction	Loan Balance	Loan Deduction As Of

New: Enrolling Optional Off-Hours Employees Using Retirement Online

Optional Employees (PT, seasonal, substitute, on-call, Per diem) are required to be on your payroll, in paid status and physically at work, the day they are enrolled.

- Employees who do not work regular, standard business hours (e.g. they work evening, weekend or holiday shift), should be enrolled on the first business day after you receive the employee's completed membership application.
  - Choose 'Weekend', After Hours' or 'Holiday from the dropdown based on when they worked.
  - Enter their first day worked into the "Hire Date" field.

Example: Employee began work on Saturday or Sunday, sign in following Monday and select 'Weekend'. If Monday was a holiday, sign in on Tuesday.

Retirement Online

Enhanced Reporting

Employer Reporting Through Retirement Online

Supports Legacy (through 12/31/2024) and Enhanced Formats

All Reporting Through Retirement Online

1 Employers log into *Retirement Online*

2 They can submit regular reports, adjustment reports, and enroll a member

Enhanced Reporting File Format

Ability to report the following:

$ Earnings breakdown

Job status changes

All employees

Online Enrollment

Benefits of Enhanced Reporting

- **Real-Time Information for Employers**
  - Mandatory members may be enrolled in real time, reducing member contribution deficiencies and interest owed.
  - New member enrollment and contribution information is available instantly.
  - Changes in contribution rates, loan payments, and service credit purchases are communicated in a timelier manner.

- **Improved Accuracy**
  - Enhanced member data collection eliminates the need to obtain information for retirement from the employer.
  - Retiree payments are more accurate.
  - Service credit information stores within the system; no more searching old records. Service credit requests and benefit estimates are more accurate.

- NEW: Enhanced Reporting tracks OT Limits for ERS and PFRS (availability based on when Employers begin Enhanced reporting)

Enhanced Reporting Options
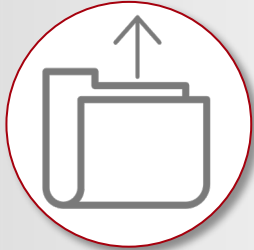
File Upload

Employers submit their reports by uploading a file to *Retirement Online*. This is especially advantageous for employers with over 50 members. **Enhanced reports will only be accepted in .txt.**

Manual Reporting

Employers create the manual report directly from the dashboard, and the system auto-populates a list of active employees so that employers do not have to manually enter each employee's NYSLRS ID and Employment Instance.
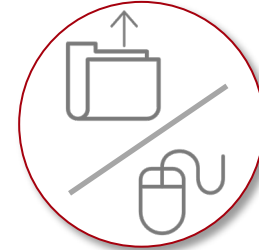
Hybrid Approach

Employers may prefer to upload a file each month with employer contributions and earnings but will use manual reporting to enroll new members and update job data on an ad hoc basis.

Reporting Method: Considerations

Manual Reporting

Your location may choose to transition from being a "file uploader" to a "manual reporter" when you begin using Enhanced Reporting.

Consider: the number of eligible employees you will report on a monthly basis and if your IT group or Payroll Provider support NYSLRS Enhanced Reporting.

Enhanced Reporting Excel Tool

For those employers not supported by a payroll provider, we have developed an excel template that will generate an enhanced .txt file.

Payroll Service Providers

Several payroll providers are certified for Enhanced Reporting, and others are in the process of being certified. A few have indicated to NYSLRS that they will not be developing an enhanced reporting file

Payroll Providers Transitioning Now

- Accu Data Workforce Solutions
- Accufund
- Complete Payroll
- EBC Payroll
- Edmunds Gov Tech MCSJ
- Finance Manager – nVision
- GTM Payroll Services
- Harris Local Government
- Harris School Solutions – WinCap
- iSolved
- KVS
- Paychex
- Pay Pro Corp
- Professional Innovative Programs and Services
- Tyler Technologies (Infinite Visions, Incode 9, Incode 10, Munis, New World)
- Williamson Law Book
- Central Square (formerly Superion)

Payroll Providers – Available Soon

Additional Payroll Providers currently working with NYSLRS to Validate their New Enhanced File Format include:

- ADP – some, dependent on location
- InfoPay
- SICAS
- Springbrook
- Ultimate Kronos Group – work with each Employer as each file is independently built by Kronos

_____

Non-responsive Payroll Providers:

- EFPR Solutions
- Enhanced Business Systems
- Prime Pay
- SMS Consulting Services

Getting Started With Gold Certification: Next Steps

- A transition coach will reach out to you to schedule a transition discussion. The timing of this call will depend on factors such as payroll provider readiness, and transition team support capacity.

- Ready to get started or have additional questions?
  Email: NYSLRSGoldCertification@osc.ny.gov

- The "Get Certified" page has information about the transition to Enhanced Reporting, called "Gold Certification"

- Informational videos, reference materials, and Questions & Answers
  https://web. osc.state.ny.us/retire/retirement_online/get-certified.php

Retirement Online

Gold Certification Process

Enhanced Transition – Progress to Date

Breakdown by Employer Type as of April 19, 2024				
	Total Employers	**In Progress**	**Gold Certified**	**Remaining Legacy**
BOCES	37	12	17	8
City	61	34	18	9
County	57	35	12	10
Development Board/Agency	53	9	39	5
Fire District	174	25	122	27
Higher/Voc Education	31	25	3	3
Housing Authority	95	10	68	17
Library	231	32	170	29
Other	86	24	51	11
Other Educational	22	4	14	4
School District	686	181	424	81
Town	920	204	590	126
Village	480	130	269	81
Water/Soil/Resource Mgmt	121	19	91	11
Total Employers	**3,054**	**744**	**1,888**	**422**

***ACTION for all Local Employers**: Reserve spot on NYSLRS Enhanced Reporting Transition Schedule. Legacy Reporting to be decommissioned.

Transitioning: What to Expect

- **Pre-Transition:** A NYSLRS transition coach will set up a call with the employer to discuss their transition timeline and the key activities they will need to complete to be gold certified.

- **Active Transition:** The employer's coach will walk them through the 4 key activities at their pace and be available to answer any questions that arise.

- **Post-Transition Support:** After the employer submits their first enhanced report, they will be able to reach out directly to their coach for the next three months for assistance. Many employers like to have a coach assist them with the second or third report submission. Your coach will be available and ready to help!

Key Activities: 4 Step Process

Your transition coach will guide you through a series of activities before you begin using enhanced reporting.

Data Mapping	Training	Instructor Led Training	Enhanced Report Submission

• Match your internal HR and Payroll codes to NYSLRS standard values
  • Job Codes
  • Earnings Codes
  • HR Transaction Types
 	
New Simplified Process
	• Complete relevant online training based on intended method of use	• Practice hiring, enrolling and other key HR activities
		• Practice submitting a regular report and an adjustment report
		• Practice resolving errors and warnings
		• Review the Member Contribution Rates page for potential updates
			• Enroll any new members, hire optional employees and retirees
			• Update member information as needed
			• Submit first regular enhanced report

1	2	3	4

Step 1: Data Mapping

**Employers will map the data in their payroll systems to match
NYSLRS defined standard values for specific data fields.
This will facilitate more accurate reporting across all NYSLRS employers.**

- NYSLRS has defined standard values for:

  - **Job Codes:** Provided at the time of enrollment

  - **Earnings Codes:** Reported on the enhanced file

  - **HR Transactions:** Used on the Enhanced File when an

    employee has a job status change

- It is of **critical importance** that these values are correctly

  mapped as they provide the detailed information needed for

  accurate, timely enrollment and benefit calculations

- Your NYSLRS transition coach will work with you to complete

  your data mapping   **(New simplified process)**

Step 2: Self-Paced Training

Employers will be required to complete the trainings that are relevant to their method of reporting.

- [Enhanced Reporting Fundamentals: Manual Reporting](#)
- [Enhanced Reporting File Upload: Transactions 1 & 2](#)
- [Enhanced Reporting File Upload: Transactions 3 & 4](#)
- [Enhanced Reporting File Upload: View & Edit](#)
- [Enhanced Reporting File Upload: Adjustments](#)

Step 3: Instructor-Led Training

**In this step, a transition coach will utilize WebEx
to walk the employer through the following activities in
the Retirement Online Training Environment:**

☐ Review: Verify member data from the Member Contributions Rates Page

☐ Hiring and Enrolling: Practice hiring an optional employee and learn how to enroll new members

☐ Data Changes: Practice using NYSLRS HR Transaction codes to make data changes and report leaves of absence

☐ Regular Report: Practice using the earnings codes from approved Data Mapping

☐ Adjustments: Practice the new Adjustment Transaction process

☐ Errors and Warnings: Validate the report and fix any errors and warnings

Step 4: Enhanced Report Submission

In this step, a transition coach will utilize WebEx to walk the employer through submitting their first report in Retirement Online. At the end of this session, the employer is officially Gold Certified.

Gold Certified

☐ <u>Data Changes</u>:   Correct any member data errors from the employer's Member Contribution Rates Page

☐ <u>Enrollments:</u>   Verify all members are enrolled and optional employees and retirees are hired in.

☐ <u>Regular Report</u>:   Use the earnings codes from the approved Data Mapping

☐ <u>Adjustments</u>:   Complete any adjustments needed

☐ <u>Submit the Report</u>:   Resolve any errors and warnings and ensure the report goes all the way through to "Posted" status

Reporting and Enrollment Resources
(Links under the Retirement Online Tab)

Administration Roles: staff actions and notifications

How-to Guides: enrollment, viewing information, job codes, submitting reports, warnings & errors, adjustments

Tips & Tricks/Hot Topics: timely information and guidance based on employer questions or issues reported

Enhanced Report/Gold Certification: benefits and transition process

For Payroll Providers: enhanced file format

Resources: training materials, webinars, member tool kit

web.osc.state.ny.us/retire/retirement_online/employers.php

Support Resources

NYSLRS Employer Retirement Online Helpdesk

Phone: 1-844-619-9614

Email: NYSLRSGoldCertification@osc.ny.gov

Visit our Website: web.osc.state.ny.us/retire/retirement_online/employers.php

Retirement Online

Appendix: Details about Enhanced Reporting and Gold Certification

Key Differences: Legacy to Enhanced

Legacy	Enhanced
Registration numbers accepted	Use of NYSLRS ID and employment instance only
Only mandatory and participating optional members are reported	All NYSLRS eligible employees must be reported (includes all retirees from reciprocal systems*)
All contributions reported in lump sum	Pre and post tax contributions reported separately
All service credit reported in lump sum	Pre and post tax service credit are reported separately

* NYSLRS, NYSTRS, NYCERS, NYCTRS, NYCPPF, NYCFDPF, NYCBERS

Key Differences: Legacy to Enhanced

Legacy	Enhanced
Adjustments reported separately	Does not require separate system to report adjustments
Adjustments reported as "should be" amounts	Adjustments are +/- corrections to previously reported data and can be negative numbers
Data Collected: • Days • Earnings • Total Contributions • Arrears and Loans	Data Collected: • Biographical Information • Job Information (salary, reg/temp, part/full time etc.) • Days & Contributions (pre-post tax amounts, loans) • Earnings Information (break out types of earnings)

Introduction to Enhanced Reporting

In the enhanced format, there are 4 Transaction Types that can be contained in the report.

Transaction Types

1) Biographical Data

2) Job Data

3) Days and Contributions

4) Earnings Details

These key identifiers are required on ALL transactions:

- Transaction Type (1-4)

- NYSLRS ID*

- Employment Instance*

- Last four numbers of the employee's SSN

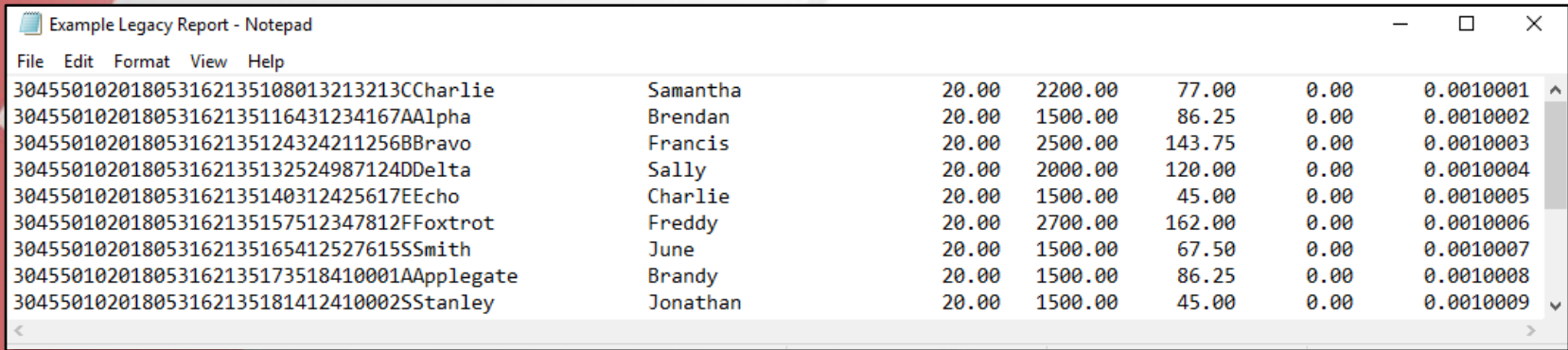- First three characters of the employee's first name

The enhanced report may contain both regular and adjustment transactions.

* More information to follow on this item
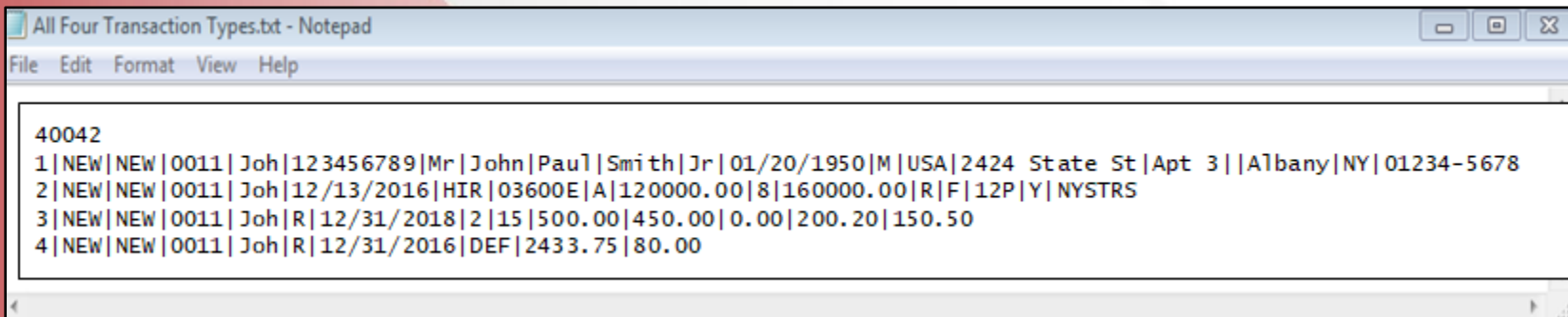
The Enhanced File

LEGACY FILE FORMAT

- Location code at the beginning of every row and one row per employee
- Report total contributions, earnings, and service credit purchase

Example Legacy Report - Notepad

```
File  Edit  Format  View  Help
30455010201805316213510801321321 3CCharlie        Samantha        20.00   2200.00   77.00    0.00   0.0010001
3045501020180531621351164312341 67AAlpha          Brendan         20.00   1500.00   86.25    0.00   0.0010002
30455010201805316213512432421125 6BBravo          Francis         20.00   2500.00   143.75   0.00   0.0010003
30455010201805316213513252498712 4DDelta          Sally           20.00   2000.00   120.00   0.00   0.0010004
30455010201805316213514031242561 7EEcho           Charlie         20.00   1500.00   45.00    0.00   0.0010005
30455010201805316213515775123478 12FFoxtrot       Freddy          20.00   2700.00   162.00   0.00   0.0010006
30455010201805316213516541252761 5SSmith          June            20.00   1500.00   67.50    0.00   0.0010007
30455010201805316213517351841000 1AApplegate      Brandy          20.00   1500.00   86.25    0.00   0.0010008
30455010201805316213518141241000 2SStanley        Jonathan        20.00   1500.00   45.00    0.00   0.0010009
```

ENHANCED FILE FORMAT

- Location Code only at the top of the file and multiple possible rows per employee
- Break out pre and post tax contributions, earnings, and service credit purchase

All Four Transaction Types.txt - Notepad

```
File  Edit  Format  View  Help

40042
1|NEW|NEW|0011|Joh|123456789|Mr|John|Paul|Smith|Jr|01/20/1950|M|USA|2424 State St|Apt 3||Albany|NY|01234-5678
2|NEW|NEW|0011|Joh|12/13/2016|HIR|03600E|A|120000.00|8|160000.00|R|F|12P|Y|NYSTRS
3|NEW|NEW|0011|Joh|R|12/31/2018|2|15|500.00|450.00|0.00|200.20|150.50
4|NEW|NEW|0011|Joh|R|12/31/2016|DEF|2433.75|80.00
```

New Field: NYSLRS ID

NYSLRS ID replaces the Registration Number
**currently used in the legacy report.**

- Since legacy reporters are continuing to use Registration Numbers, they will continue to be issued for this purpose.

- The NYSLRS ID is 9 characters long: an R followed by an 8-digit number

  R12345678

- Employers must report their employees using the NYSLRS ID once they transition to enhanced reporting. It is available on the Member Contribution Rates Page.

  These numbers will be generated for new employees during the enrollment process.

New Field: Employment Instance

This is another key identifier assigned by NYSLRS and is used to determine which job is being reported in the enhanced report.

- Employment Instance is a sequential number based on the number of jobs an employee has held at participating employers.

ERS and PFRS instances encompass a different range of numbers.

00 - 49 **ERS**

50 - 99 **PFRS**
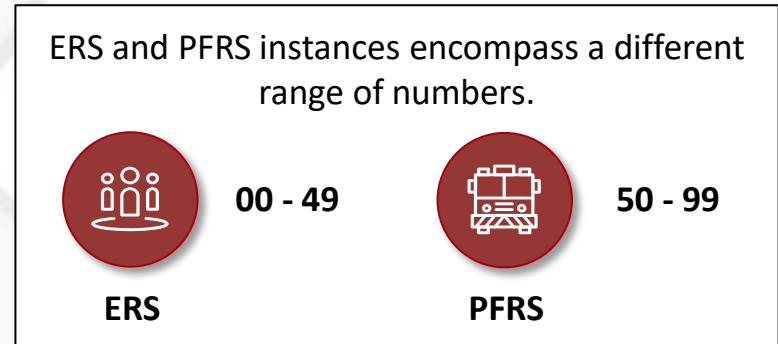
- The Employment Instance may start at a number higher than 0 if:
    - The person has previously held other jobs with participating employers
    - The person has more than one job that is reported to NYSLRS
        - i.e., they are currently employed with multiple employers or hold multiple jobs at the same employer
- This number is available on the Member Contribution Rates Page in Retirement Online for current employees and will be generated for new employees during the enrollment process.

Mandatory Membership

Employee Classification is a required field that describes the employee's status regarding time

- **Full Time** employees work the entire standard workday established for the job title. An employee who is hired to work less than the standard workday is considered **Part-Time**.

- **Regular** employees are in positions that have no projected end date, regardless of any probationary status. If they do not match this description, they are **Temporary**.
  - An employee can be a 12-month employee but be classified as temporary if their role has a projected end date.

- **Employee Class** describes the employees time obligation at the job
  - **12**   12 Month
  - **12P**   12 Month Provisional
  - **10**   10 Month
  - **S**   Seasonal
  - **OC**   On Call
  - **SB**   Substitute
  - **PD**   Per Diem

Requirements for Mandatory Enrollment:

- **Full-time, Regular, 12 Month** positions, earning at least current state minimum wage. ($22,200 annually)
- All police officers
- All paid firefighters

Job Data Changes

The HR Transaction Code provides the ability to report a significant change to job data, leaves of absence, return from leave, or termination.

- Changes to an employee's job status can impact service crediting and benefit calculations for employees, as well as required loan payment deductions
- When an employee has a job status change, employers are required to include this information on the Enhanced Report to be stored for the employee
- Accepted HR Transaction Codes are:
    - **HIR**   Hire
    - **REH**   Rehire
    - **DTA**   Data Change
    - **LOA**   Leave of Absence
    - **MED**   Medical Leave of Absence
    - **MIL**   Military Leave
    - **RFL**   Return from Leave (any)
    - **TER**   Termination