NYSLRS
New York State & Local Retirement System

Upload a Regular Monthly Report File

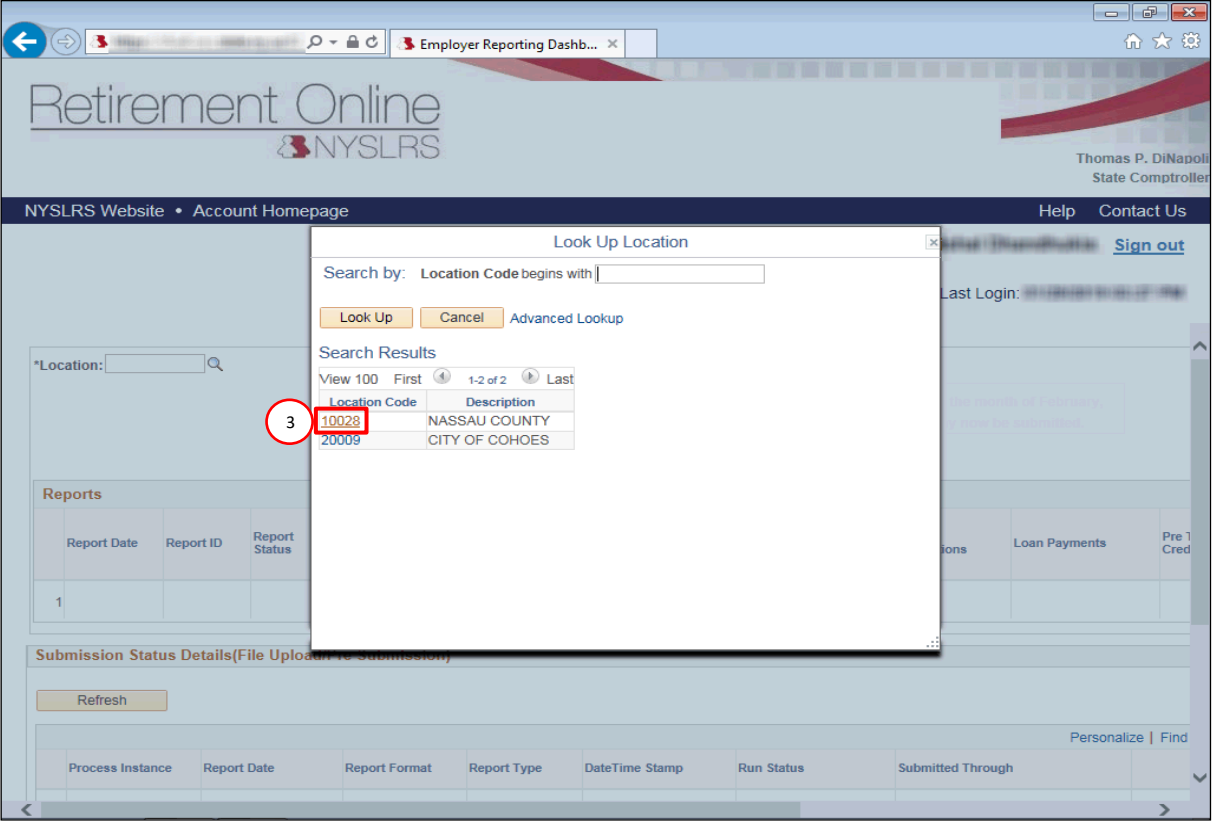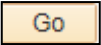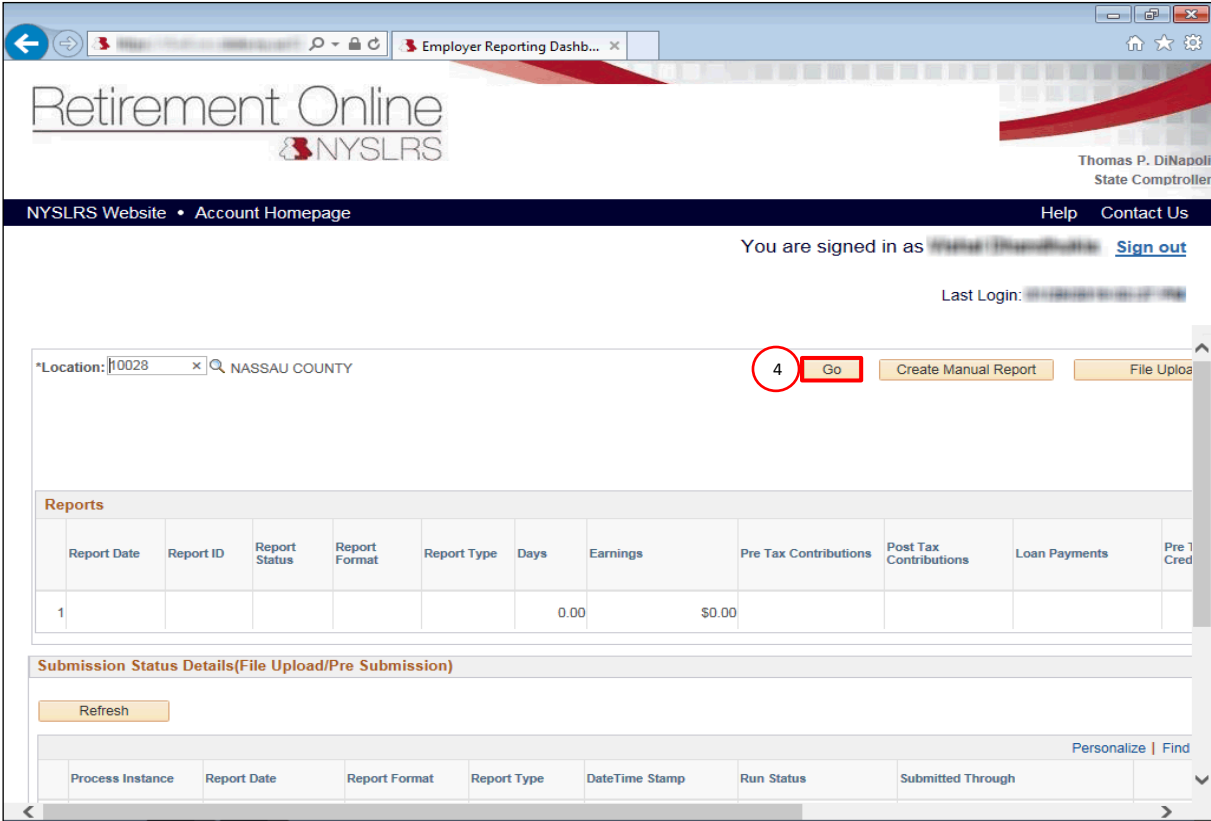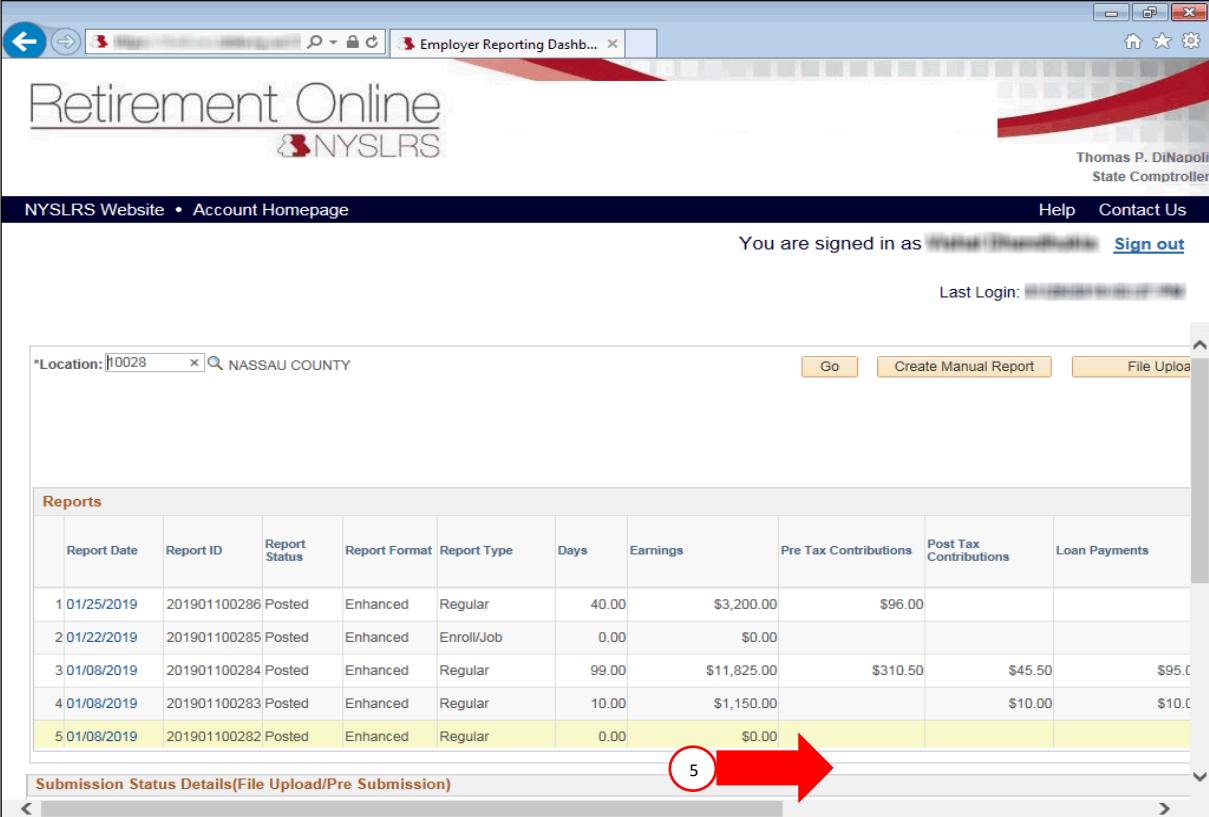This job aid shows you (as an Employer Reporting Uploader) how to upload a regular monthly report file containing multiple regular, adjustment, and/or enrollment transactions using the enhanced reporting format in *Retirement Online*.
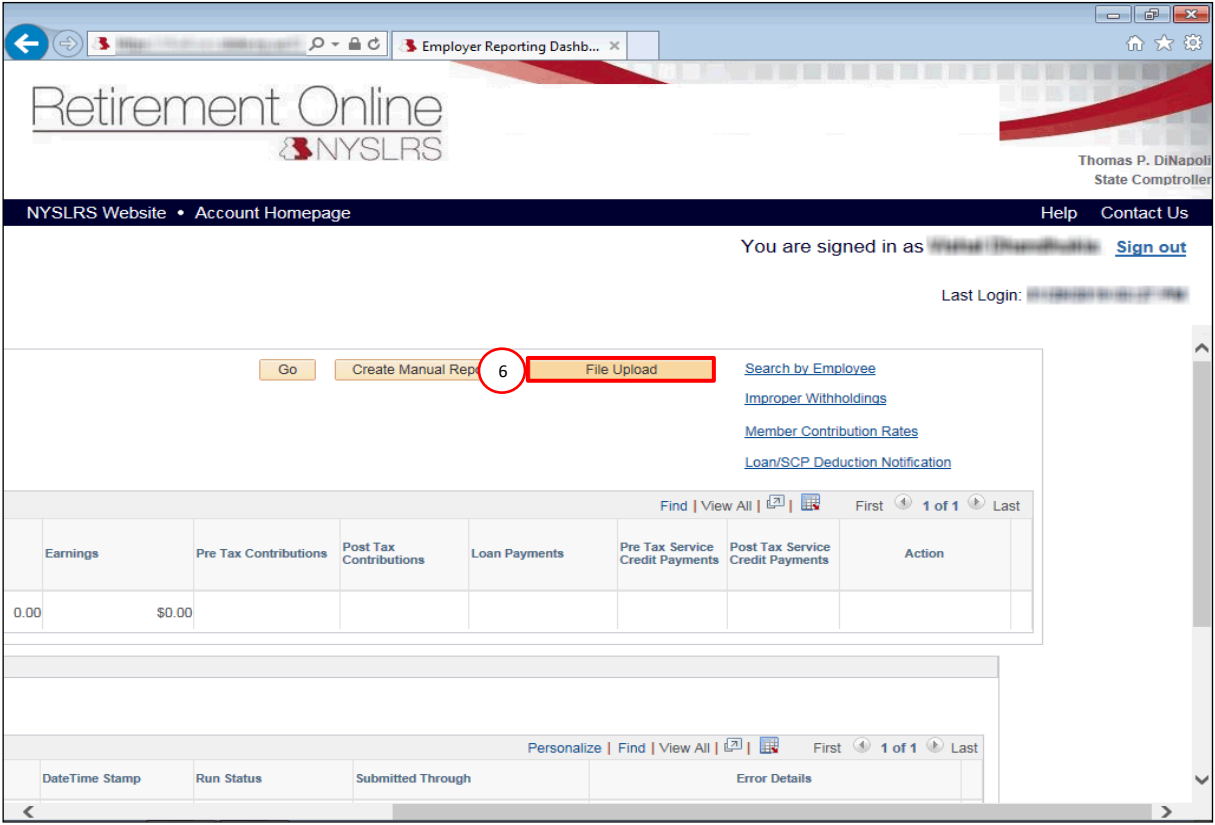
Step	Action
1.	From the *Retirement Online Account Homepage,* click the **Access Reporting Dashboard** button. Access Reporting Dashboard	

Step	Action	
2.	The *Employer Reporting Dashboard* page will appear. Click the **Look Up** icon next to the **Location** field. 🔍	
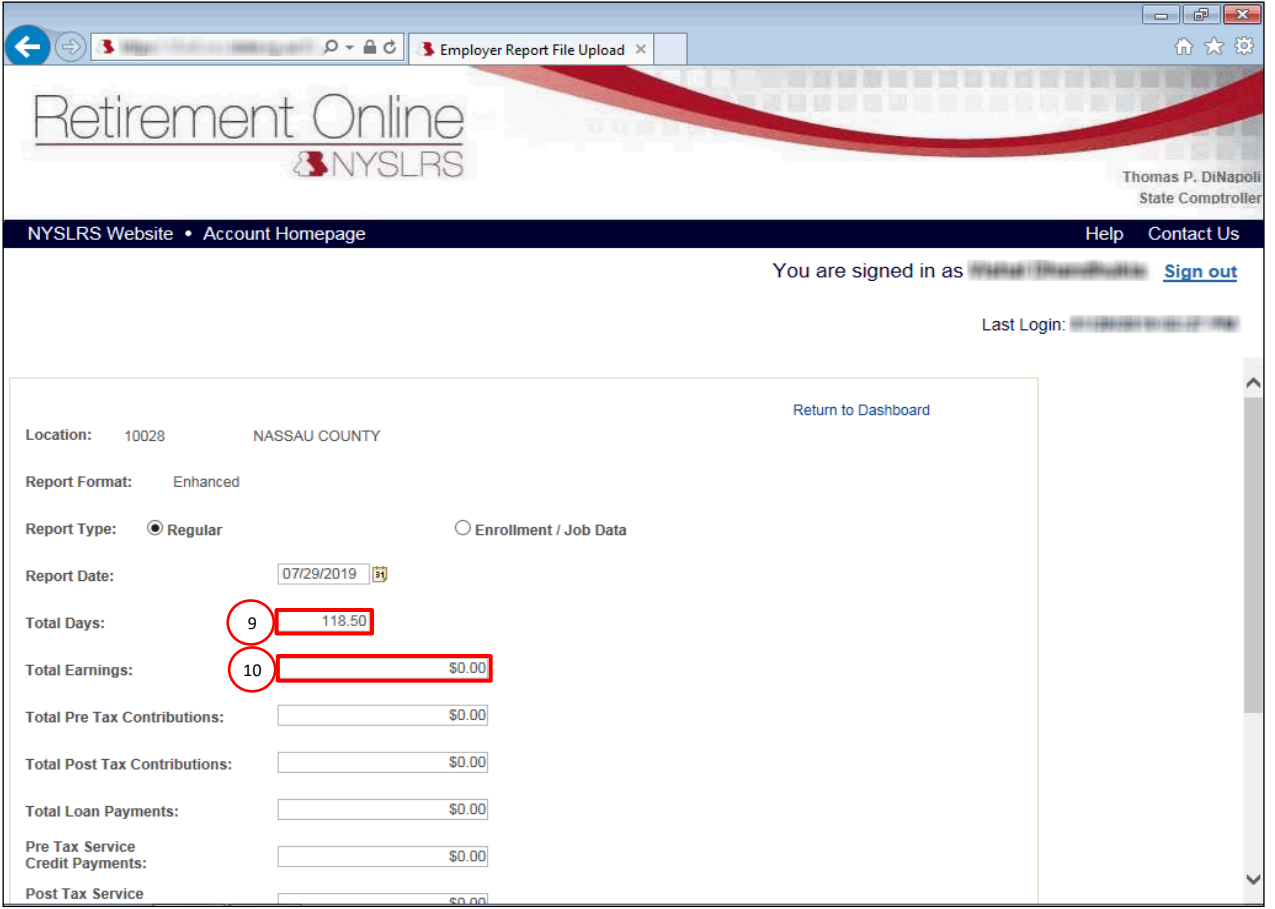
Step	Action
3.	The 'Look Up Location' pop-up box will appear. Click the **Location Code** link from the list for the location you want to report. `10028` **Note:** If you have access to only one location code, it will display automatically. If you have access to more than one location code, one will display by default. You may select a different code to report for a different location.	
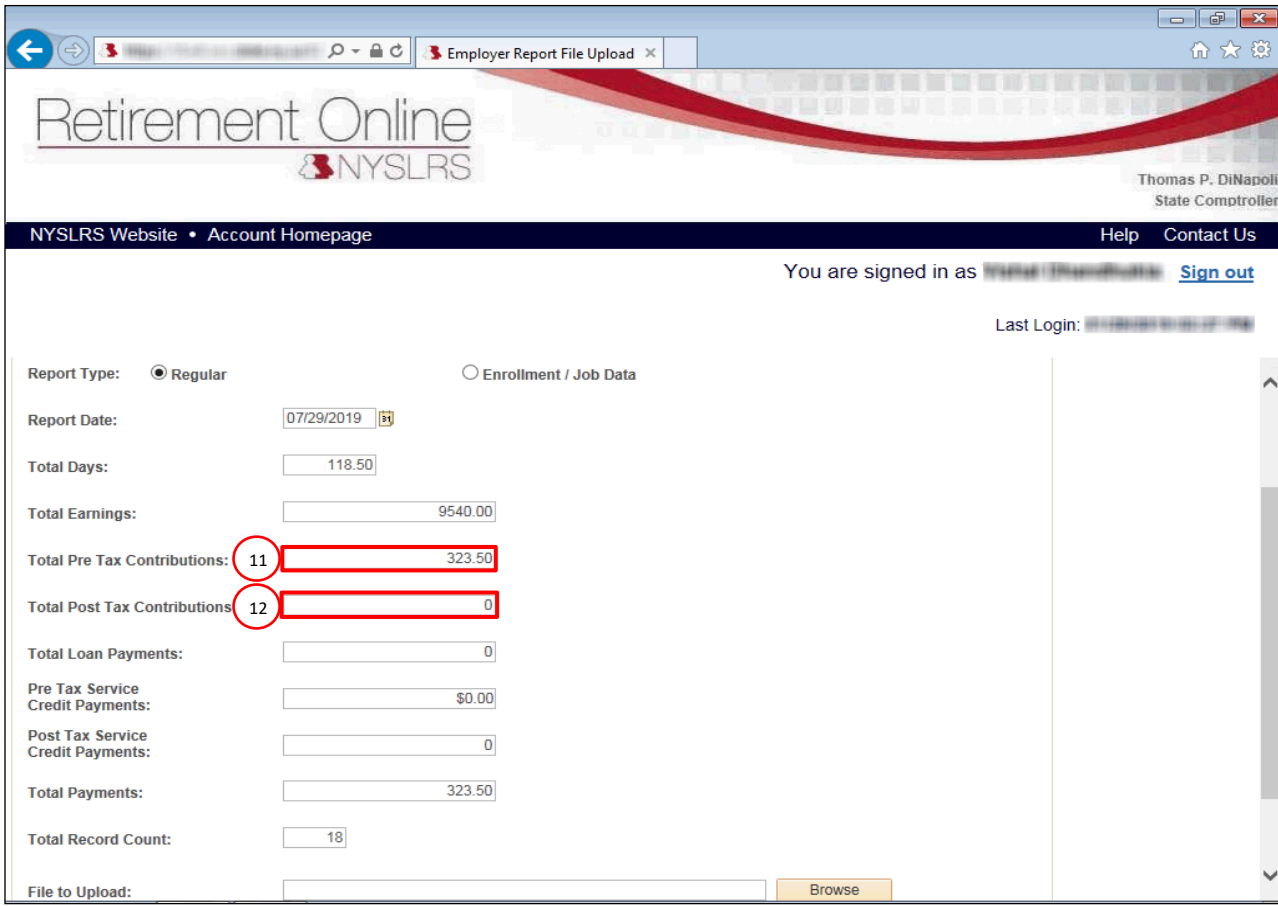
Step	Action
4.	Click the **Go** button. Go

Step	Action	
5.	A list of previous reports for this location will appear. **Scroll to the right** until you see the **File Upload** button.	

Step	Action
6.	Click the **File Upload** button. File Upload

Step	Action	
7.	The *File Upload* page will appear. This page defaults to the **Report Type**: **Regular.** **Note:** The location code will carry over from the *Employer Reporting Dashboard* page. Multiple Transactions, can be uploaded on a regular report which can include adjustments, enrollments, and job data transactions.	
8.	The **Report Date** defaults to the current date. This allows for submission of multiple dates and transactions on a single file.	
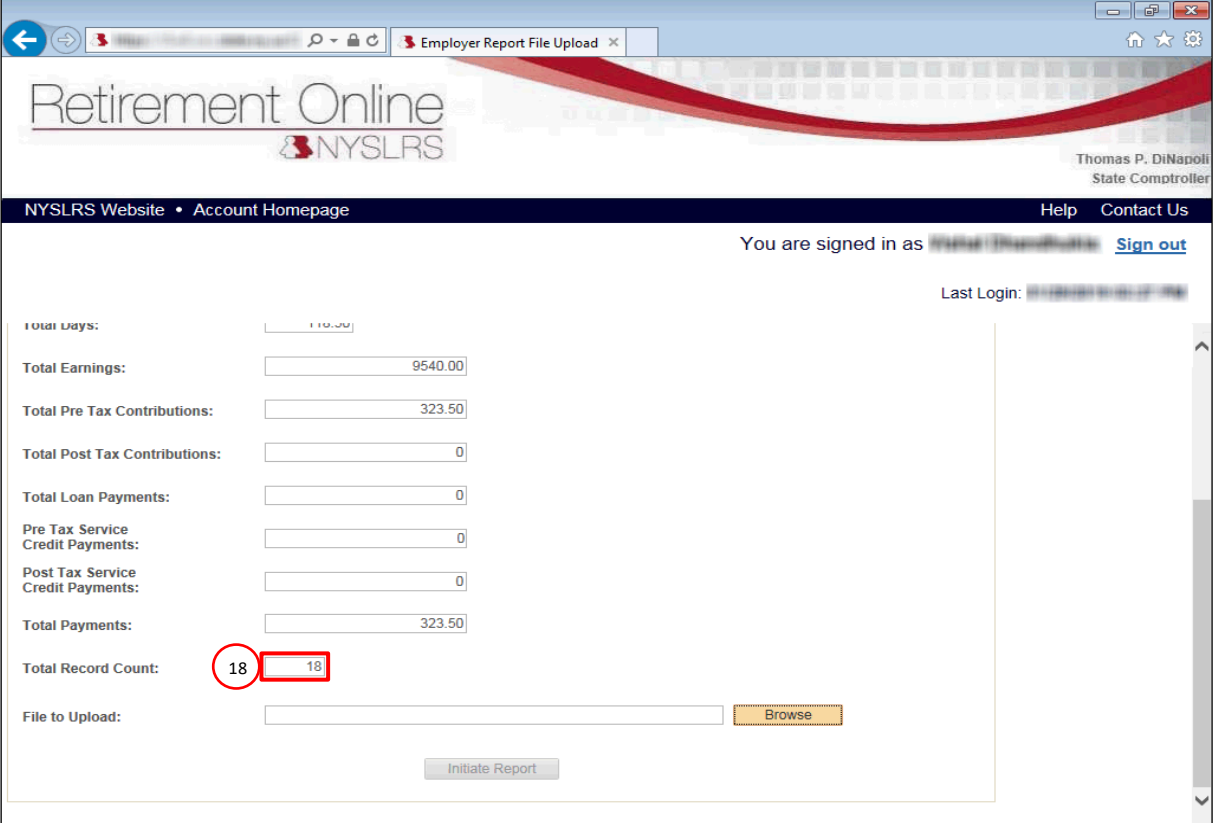
Step	Action	
9.	Tab into the **Total Days** Field and enter the sum total days for all transactions on your file. [ ] **Note:** The sum total may include the addition of positive and subtraction of negative adjustments on the report.	
10.	Tab into the **Total Earnings** field and enter the sum total earnings for all transactions on your file. [✕] **Note:** The sum total may include the addition of positive and subtraction of negative adjustments on the report.	

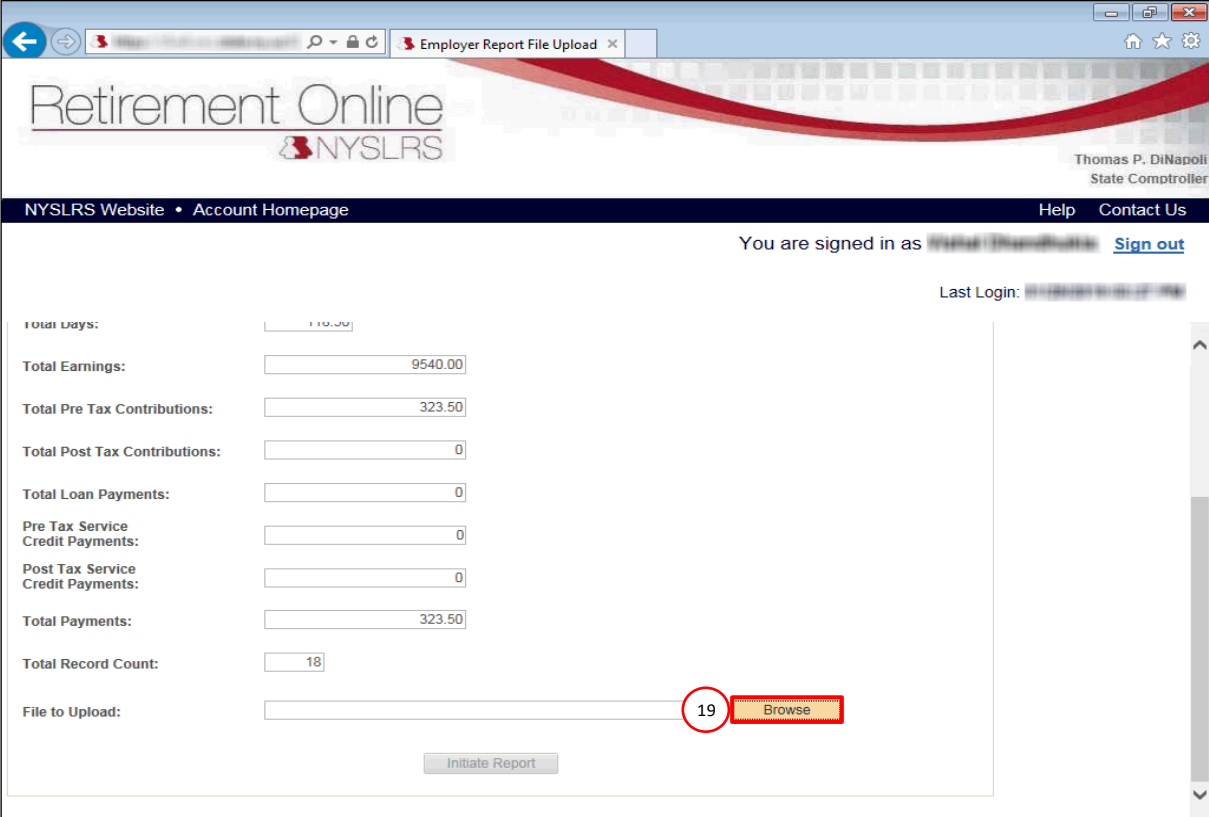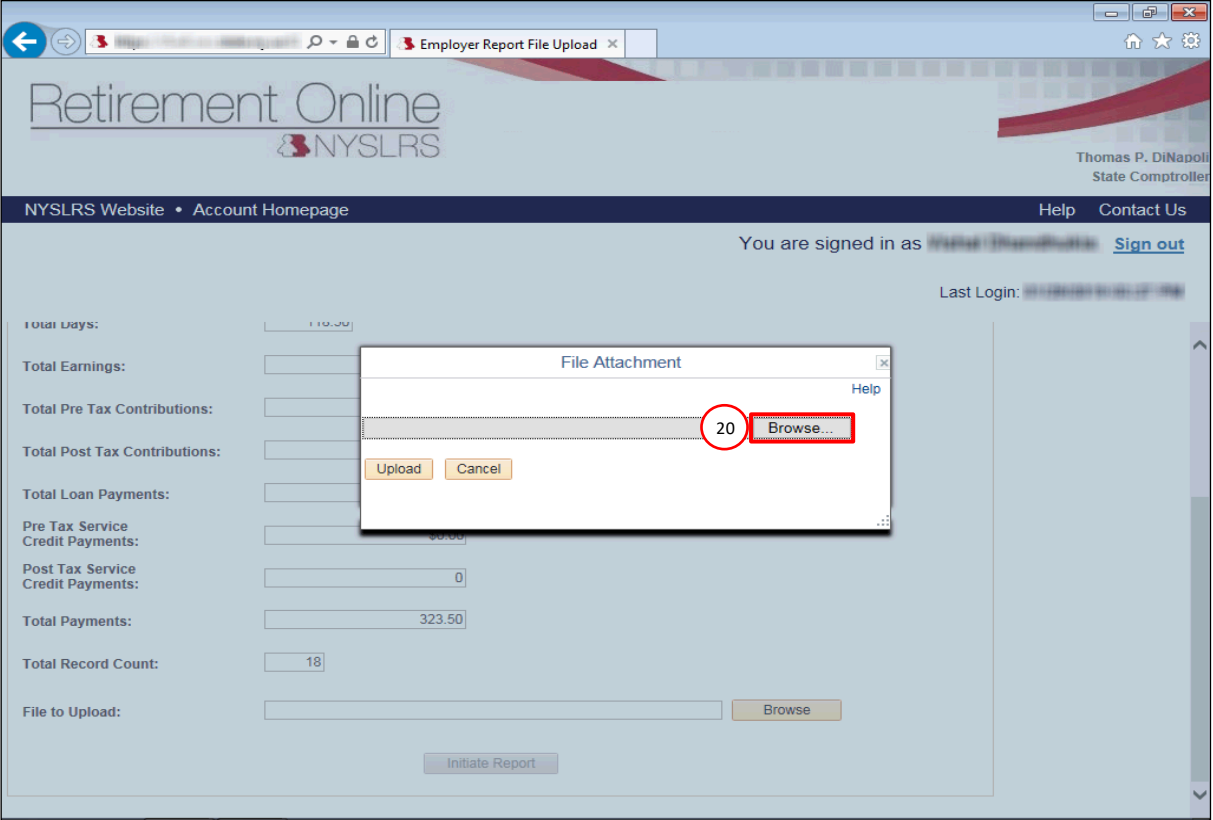| Step	Action	
⑪	Tab into the **Total Pre Tax Contributions** field and enter the sum of Total Pre Tax Contributions for all transactions on your file. [✕] **Note:** Total Pre Tax Contributions cannot be adjusted, if you are reporting an adjustment.	
⑫	Tab into the **Total Post Tax Contributions** field and enter the sum of Total Post Tax Contributions for all transactions on your file. [✕] **Note:** Total Post Tax Contributions cannot be adjusted, if you are reporting an adjustment.	Employer Report File Upload ✕ **Retirement Online** **NYSLRS** Thomas P. DiNapoli State Comptroller NYSLRS Website • Account Homepage Help Contact Us You are signed in as **Sign out** Last Login: Report Type: ● Regular ○ Enrollment / Job Data Report Date: 07/29/2019 Total Days: 118.50 Total Earnings: 9540.00 Total Pre Tax Contributions: ⑪ 323.50 Total Post Tax Contributions ⑫ 0 Total Loan Payments: 0 Pre Tax Service Credit Payments: $0.00 Post Tax Service Credit Payments: 0 Total Payments: 323.50 Total Record Count: 18 File to Upload: Browse

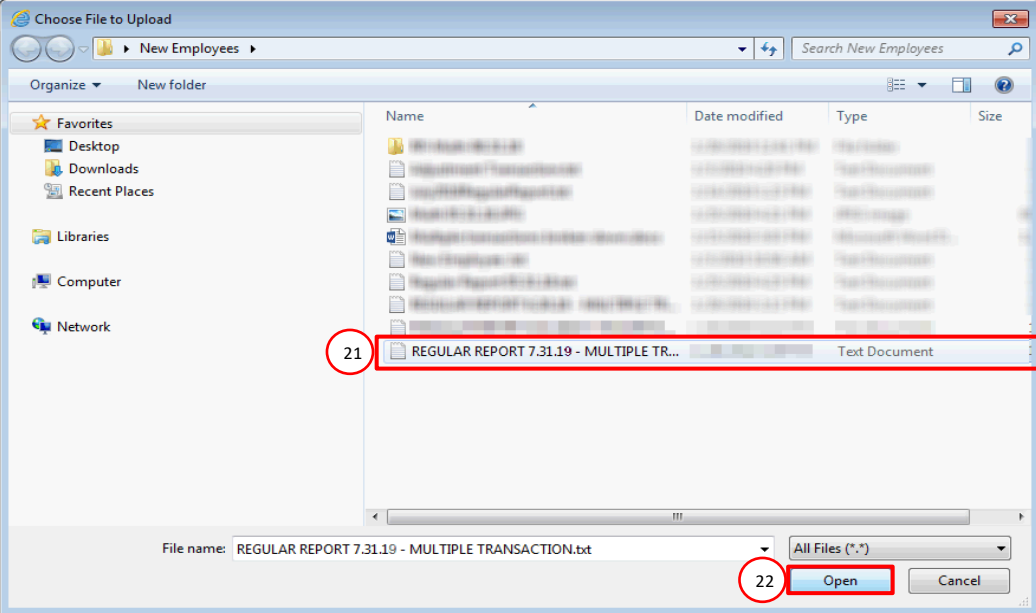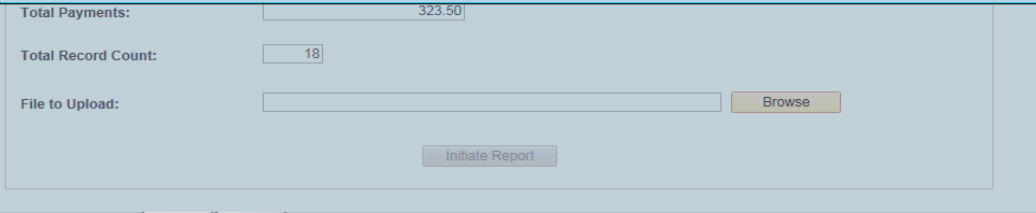| Step	Action	
13.	Tab into the **Total Loan Payments** field and enter the sum of Total Loan Payments for all transactions on your file. [input field with ×] **Note:** Total Loan Payments cannot be adjusted, if you are reporting an adjustment.	
14.	Tab into the **Total Pre Tax Service Credit Payments** field and enter the sum of Total Pre Tax Service Credit Payments for all transactions on your file. [input field] **Note:** Pre Tax Service Credit Payments cannot be adjusted, if you are reporting an adjustment.	

Step	Action	
⑮	Tab into the **Total Post Tax Service Credit Payments** field and enter the sum of Total Post Tax Service Credit Payments for all transactions on your file. **Note:** Post Tax Service Credit Payments cannot be adjusted, if you are reporting an adjustment.	
⑯	Tab into the **Total Payments** field and enter the sum total of Total Pre Tax Contributions, Total Post Tax Contributions, Total Loan Payments, Total Pre Tax Service Credit Payments, and Total Post Tax Service Credit Payments. **Note:** This amount does not include Total Earnings.	
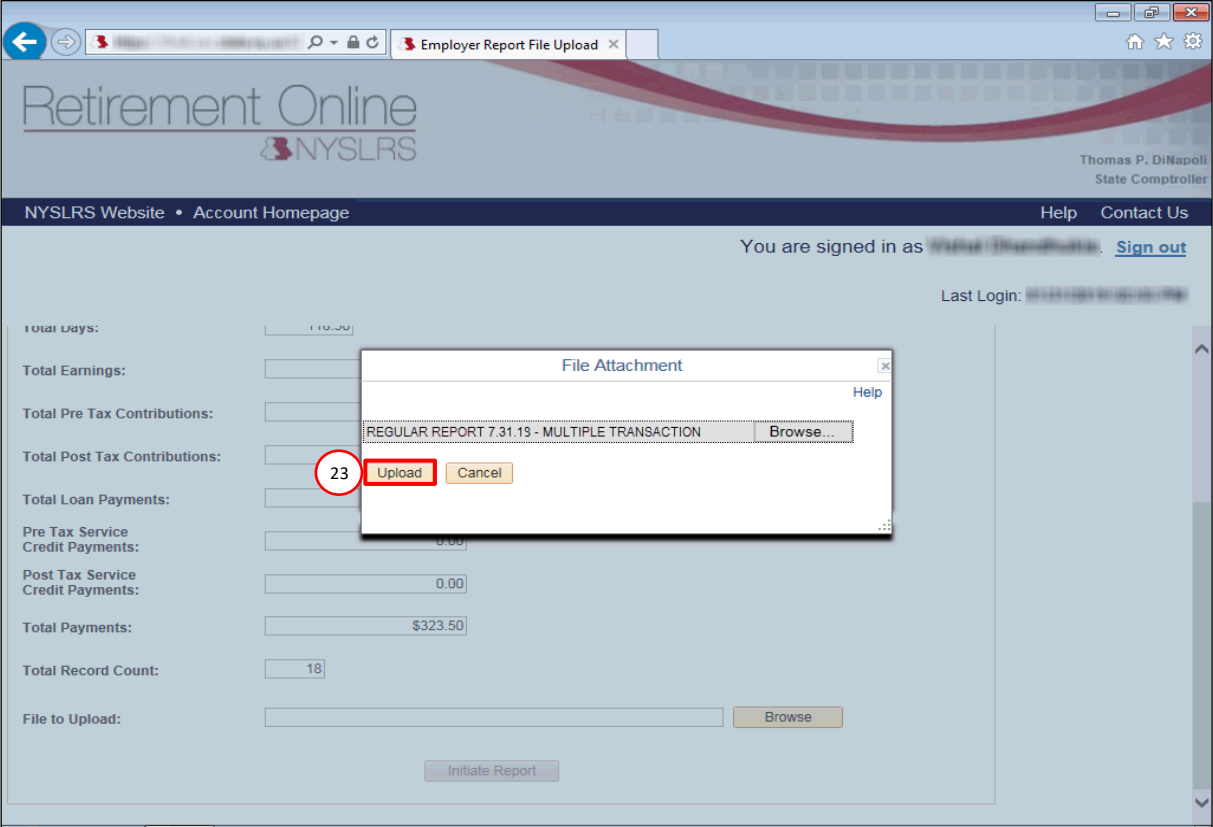
Step	Action
(17)	**Scroll down** to the **Total Record Count** field.

Retirement Online
NYSLRS

Thomas P. DiNapoli
State Comptroller

NYSLRS Website • Account Homepage   Help   Contact Us

You are signed in as ████████   Sign out

Last Login: ████████

Return to Dashboard

Location: 10028   NASSAU COUNTY

Report Format: Enhanced

Report Type: ◉ Regular   ○ Enrollment / Job Data

Report Date: 07/29/2019

Total Days: 118.50

Total Earnings: 9540.00

Total Pre Tax Contributions: 323.50

Total Post Tax Contributions: 0

Total Loan Payments: 0

Pre Tax Service
Credit Payments: $0.00

Post Tax Service
Credit Payments: 0

Total Payments: ×
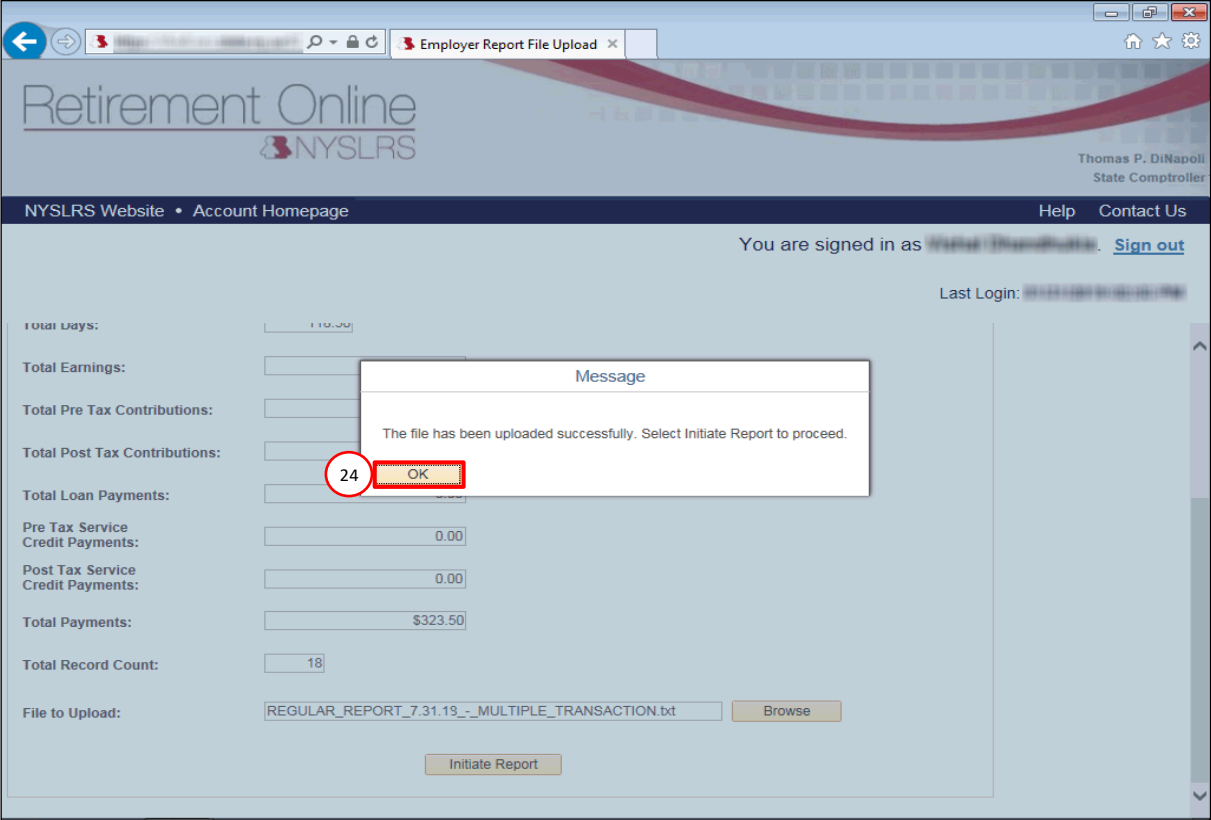
Step	Action
(18)	Tab into the **Total Record Count** field and enter the sum of all Transaction rows that are in the file. **Note:** In the enhanced file format, there may be multiple transactions per employee. Each transaction should be counted in the record count. Do not include the Location Code row in your record count.	
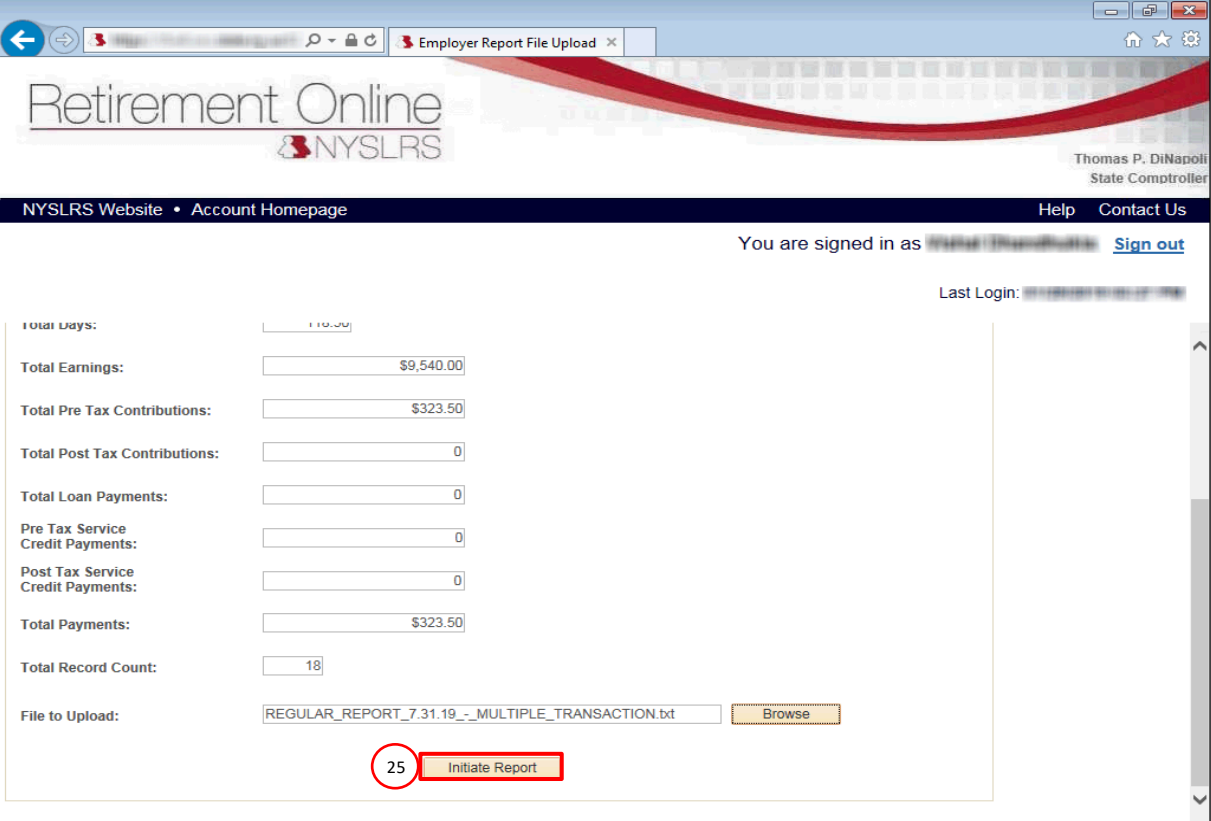
Step	Action
⑲	To select the file to upload, click the **Browse** button. Browse
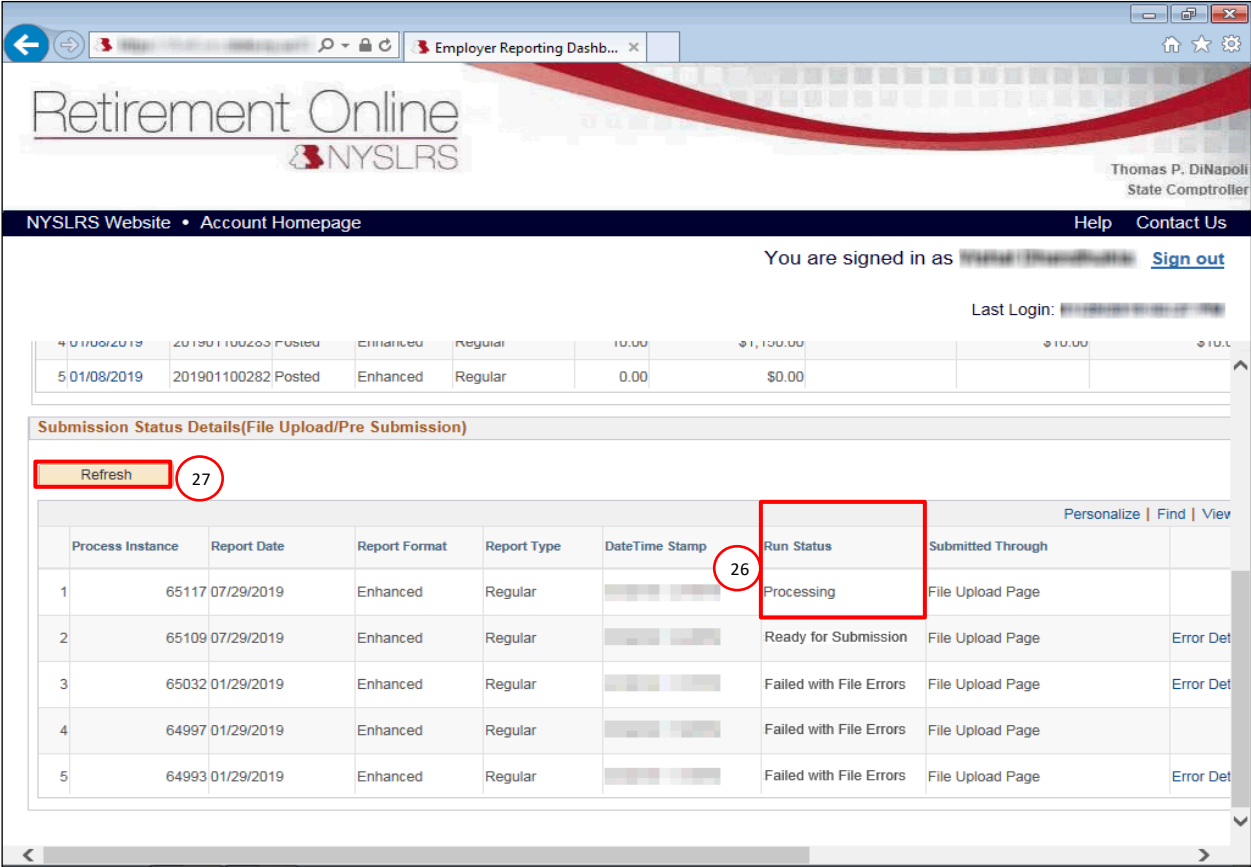
Step	Action
(20)	The 'File Attachment' pop-up will appear. Click the **Browse** button to search your device for the file. Browse...
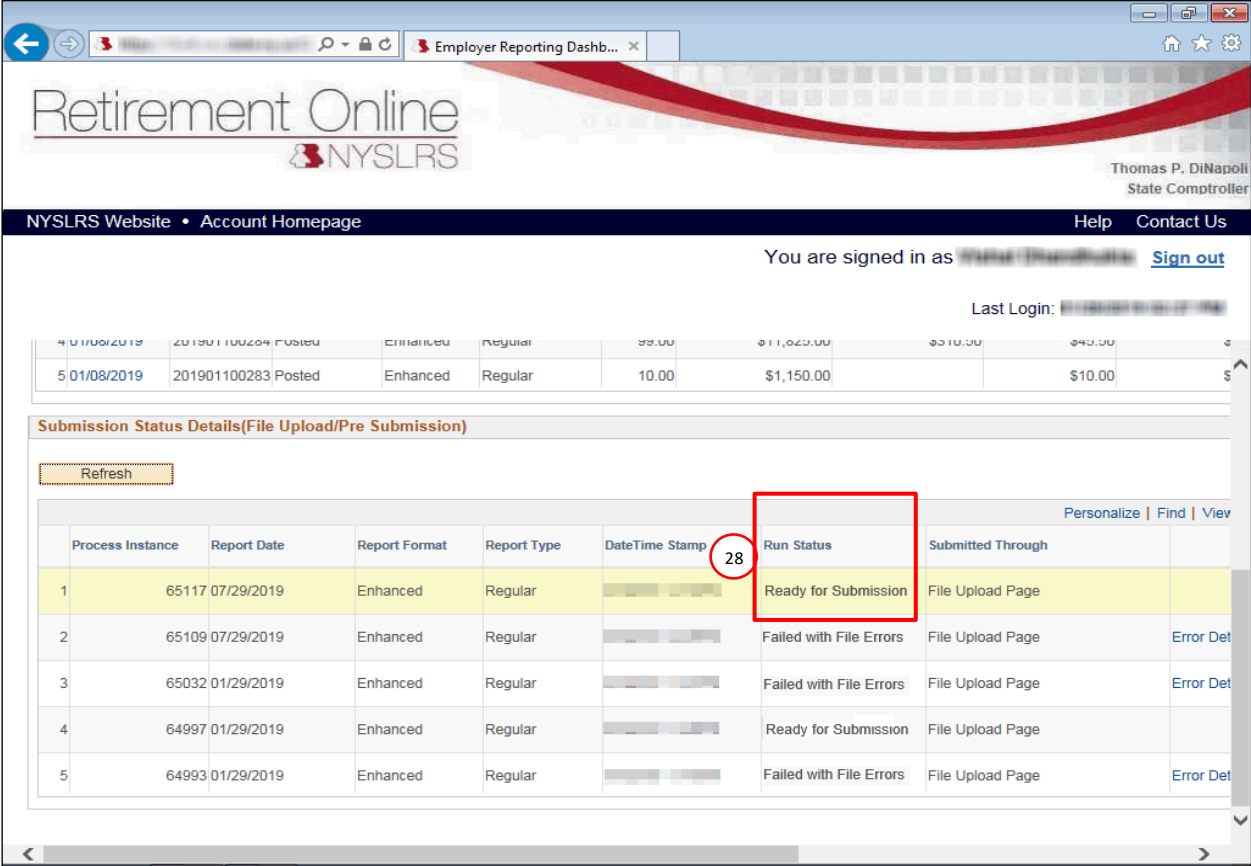
Step	Action
(21)	The 'Choose File to Upload' window will appear. Locate the file on your device to upload. Click on the **File**. **Note:** *Retirement Online* will only accept files in the .txt format for enhanced reports.	
(22)	Click the **Open** button. Open	

Step	Action
(23)	You will return to the 'File Attachment' pop-up. Click the **Upload** button to upload the document. Upload	

Step	Action
(24)	A 'Message' pop-up will appear confirming the file has been successfully uploaded. Click the **OK** button. OK	

Step	Action
(25)	To upload the report to *Retirement Online,* click the **Initiate Report** button. Initiate Report

Step	Action
(26)	The *Employer Reporting Dashboard* page will appear. Scroll down to the '**Submission Status Details (File Upload/Pre submission)**' section to view the status of the upload. **Note**: The uploaded report will appear as a new row in a status of 'Processing' at the top of the 'Submission Status Details (File Upload/Pre submission)' section.	
(27)	To view the progress of the report, click the **Refresh** button. Refresh **Note**: The processing time will vary depending on the file size. The status will begin as Processing and change to either: No Success, Success, Error, Failed with File Errors, or Ready for Submission.	

Step	Action
㉘	If the **Run Status** indicates 'Ready for Submission,' the file is ready to submit to NYSLRS. You have successfully uploaded a regular monthly report file using the enhanced file format into *Retirement Online*. **Note***:* If you are the Employer Reporting Uploader, you have completed the steps associated with your role and will stop here. Next, the Employer Reporting Submitter will continue on to submit and post the report, as detailed in our job aid, "Submit and Post a Regular Monthly Report File."	