Summary Page How-To Guide



This guide shows you (as an employer reporting contact) how to report non-overtime pensionable earnings and overtime earnings on the Summary Page in *Retirement Online* using either <u>Manual Reporting</u> or a <u>File Upload</u>.

Manual Reporting

You can manually report earnings breakdowns by accessing each member's Data Entry Page and entering information individually. Follow the steps below.

Step	Action		
1	In the View All table, click a NYSLRS ID to access the member's Data Entry Page.		
2	On the Data Entry Page, enter the amounts including cents in the following fields: April 2022 – March 2023 Earnings • Non-Overtime Pensionable Earnings • Overtime Earnings April 2023 – March 2024 Earnings • Non-Overtime Pensionable Earnings • Overtime Earnings		
3	 Verify the information entered is accurate, then click Save. A popup box appears with either: An error message: Click OK to close the popup box. Correct the amount(s) entered. Click Save again. OR - A confirmation message stating, "Data has been properly saved." Click OK to close the popup box. 		
4	Click Return to Search to go back to the Summary Page.		
5	Repeat steps 1–4 for each member in the View All table. Note: Entering and saving information on the Data Entry Page does not automatically submit the information to NYSLRS. Once you've completed manually entering information for each member, you must complete the final step below to submit the information to NYSLRS .		
6	 Submit the information to NYSLRS: On the Summary Page, click Submit. A popup box appears with a message stating, "The data has been submitted." Click OK to close the popup box. 		

File Upload

You can report earnings breakdowns by downloading a file of the member data listed in the View All table and entering information into the file. Then, upload the file to update all members in the View All table simultaneously. Follow the steps below.

Step	Action		
1	At the top right of the View All table, click the 🔤 icon to download a file with the data.		
2	Navigate to the downloaded file and open it in Excel .		
3	 Format Column C: SSN (Last 4 Digits): This column must be formatted with five leading X's followed by four digits (no dashes). To remove dashes from the SSNs (for example, if XXXX1234 appears as XXX-XX-1234): Click Column C to highlight the column. On the Home tab, click Find & Select, then from the dropdown menu, click Replace OR - Press CTRL + H to use the keyboard shortcut to open the Find and Replace dialog box. In the Find what field, enter a hyphen (-) without any spaces. Click Replace All. A popup box appears with a message stating, "All done. We made {number} replacements." Note: There are two hyphens in each SSN, so the number of replacements will be double the number of members you have. For example, if you have 10 members, there will be 20 replacements. Click Close to close the popup box. Click Close to close the Find and Replace dialog box. 		
4	 Note: This step is only required if your location code starts with a zero. Format Column E: Location Code: This column must be formatted as a five-digit number. To add leading zeros to your Location Code (for example, if your Location Code is 00010, and it appears as 10): Click Column E to highlight the column. Right-click anywhere on the highlighted column. From the dropdown menu, click Format Cells. The Format Cells dialog box appears. On the Number tab, under Category, click Custom. From the list of predefined options, click 0. (Do not select any other variation.) In the field under Type, enter four additional zeros for a total of five zeros: 00000. Click OK. 		
5	Delete Column O: Error : Click Column O to highlight the column. Right-click anywhere on the highlighted column. From the dropdown menu, click Delete. 		

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Step	Action			
6	 Enter amounts including cents in the following columns: FY 1 Non-Overtime Earnings FY 1 Overtime Earnings FY 2 Non-Overtime Earnings FY 2 Overtime Earnings FY 2 Overtime Earnings Note: When there are no earnings to report, enter 0. If a row in your file contains a blank cell, the row will be skipped—no information for that member will not populate in the View All table. 			
7	Set each column Click on Colu Right-click an From the drop The Column In the field, er Click OK to column Repeat these each column Repeat these each column Column A B C D E F G H I J K L M N 	nwidth: umn A to highlight the column. nywhere on the highlighted column. odown menu, click Column Width. Width dialog box appears. ter 10. close the dialog box. e steps for columns B through N width. NYSLRS ID Name SSN (Last 4 Digits) Registration Number Location Code Retirement System Fiscal Year 1 FY 1 Non-Overtime Earnings FY 1 Overtime Earnings FY 2 Total Earnings FY 2 Non-Overtime Earnings FY 2 Overtime Earnings	I, referring to the table Column Width 10 33 9 8 5 1 4 10 10 10 11 4 10 <t< th=""><th>below for the value of</th></t<>	below for the value of
8	Save the Excel f • Click File, the – OR – • Press CTRL – Note: It's important	file: n click Save. ⊦ S to use the keyboard shortcut. r to save the Excel file in case you need t	o return to it and correct e	errors before uploading the

file again.

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Step	Action		
9	 Save as a PRN file: Click File. Click Save As. Select Formatted Text (Space delimited) (*.prn) from the dropdown menu. Enter a file name. Note: The file name, including the .prn extension, must be shorter than 53 characters. Do not use periods in the file name other than the one that comes before the file extension. Choose a folder, if you want to save it in a different location. Click Save. 		
10	Return to the Summary Page in <i>Retirement Online</i> .		
11	 Upload the PRN file: Click the Browse button. The File Attachment dialog box will appear. Click Choose File. From the dialog box, navigate to your file and either: Double-click on the file. OR - Select the file and click Open. The dialog box closes, and the file name appears in the File Attachment dialog box. Click Upload to start the file upload process. A popup box appears with either: An error message stating either: The file name is too long. The file name includes more than one period. Click OK to close the popup box. Correct your PRN file. OR - Return to your Excel file and repeat step 9: Save as a PRN File. Repeat steps 10–11. OR - A confirmation message stating, "File upload has begun. Please click the Refresh button on the Summary Page to complete the process." Click OK to close the popup box. Click OK to close the popup box. 		

Step	Action		
	Click the Refresh button.		
	A popup box appears with either:		
	 An in-progress message stating, "The file is uploading. Please do not click any other buttons or navigate off this page until the file upload has completed." 		
	 Click OK to close the popup box. 		
	 Wait, then click the Refresh button again. 		
12	– OR –		
	 A confirmation message stating, "The page has refreshed. To determine whether the file upload was successful, check the View All table." 		
	 Click OK to close the popup box. 		
	 Proceed to the next step. 		
	Note: If you click the Refresh button again after you receive the confirmation message, a popup box appears with a message stating, "The page has refreshed—no file is uploading."		
	Deview each your in the View All table correctully to determine whether the information from your		
	file populated in the Non-Overtime Earnings and Overtime Earnings columns for each fiscal year.		
	Check the Error column:		
	• N = No:		
	 The information from your file populated and there are no errors. 		
	 The information from your file did not populate because the row was skipped. 		
	• Y = Yes:		
	 The information from your file populated and there are errors. 		
	If information from your file did not populate or if there are errors:		
13	Correct errors using the file upload process:		
	Return to your Excel file.		
	 Repeat steps 8–12 		
	Correct errors using manual reporting:		
	 Follow the steps in the Manual Reporting section on page 1 to enter corrected information 		
	for each member on their Data Entry Page.		
	If there are no errors or once all errors have been corrected, proceed to the next step.		
	Note: The file upload process does not automatically submit the information to NYSLRS. Once you've verified the information from your file populated in the View All table and corrected any errors, you must complete the final step below to submit the information to NYSLRS .		
	Submit the information to NYSLRS:		
14	On the Summary Page, click Submit .		
	 A popup box appears with a message stating, "The data has been submitted." 		
	Click OK to close the popup box.		

Identifying and Correcting Errors

Review each row in the View All table *carefully* to determine whether the information from your file populated in the Non-Overtime Earnings and Overtime Earnings columns for each fiscal year.

IMPORTANT: When a row is skipped, the Error column will display N-do not solely rely on the Error column.

Error Column = N

If the information for a member did not populate in the View All table but the Error column displays N, the row was skipped as a result of one or more of the following errors:

Dessible Emere	How To Correct Errors Using:			
Possible Errors	File Upload	Manual Reporting		
One or more cells in the Overtime Earnings or Non-Overtime Earnings columns were left blank.	 Do not leave cells blank. Enter 0 if there are no earnings to report. OR - Enter the amount if there are earnings to report. 	Follow the steps in the <i>Manual</i> <i>Reporting</i> section on page 1 to enter corrected information for each member on their Data Entry Page.		
Multiple rows exist with same NYSLRS ID, SSN, System, and Registration Number. (Exception: When an employee is a member of both retirement systems, multiple rows will exist and the information from your file should populate to the corre- sponding row in the View All table.)	 Do not add rows with information for members beyond what's provided in the View All table. Verify the information in your file against the information in the View All table. Delete any rows in your file that do not exist in the View All table. 			
One or more of the following changed and does not match the information in the View All Table:	Do not edit information for members in your file.Verify the information in your file against the information in			
Name	the View All table.			
SSN (Last 4 Digits)	 If something does not match, change the information in your 			
Registration Number	file to match the information in the View All table			
Location Code	the view Air table.			
Retirement System				
Fiscal Year 1				
FY 1 Total Earnings				
Fiscal Year 2				
FY 2 Total Earnings				

Error Column = Y

If the information for a member populated in the View All table but the Error column displays Y, the row contains one or more of the following errors:

Doosible Erroro	How To Correct Errors Using:		
Possible Errors	File Upload	Manual Reporting	
One or more columns are not set to the correct width. <i>Note: This error will result in a Y in</i> <i>every row.</i>	Referring to step 7 on page 3.Check the width of each column in your file.Correct any widths.	Follow the steps in the <i>Manual</i> <i>Reporting</i> section on page 1 to enter corrected information for each member on their Data Entry Page.	
N/A was entered into one of the Overtime Earnings or Non-Overtime Earnings columns.	• Enter 0 if there are no earn- ings to report.		
FY 1 Overtime Earnings are greater than FY 1 Non-Overtime Earnings.	 Correct the amounts entered and ensure the Overtime Earnings are less than Non-Overtime Earnings. 		
FY 2 Overtime Earnings are greater than FY 2 Non-Overtime Earnings.			
The sum of the FY 1 Overtime Earnings and FY 1 Non-Overtime Earnings do not equal the Fiscal Year 1 Total Earnings.	 Correct the amounts entered and ensure the sum of the Overtime Earnings and Non-Overtime Earnings equal the Total Earnings for the fiscal 		
The sum of the FY 2 Overtime Earnings and FY 2 Non-Overtime Earnings do not equal the Fiscal Year 2 Total Earnings.	year.		