Summary Page How-To Guide

NYSLRS
New York State and Local Retirement System

This guide shows you (as an employer reporting contact) how to report non-overtime and overtime earnings on the Summary Page in *Retirement Online* using either a Manual Reporting or File Upload process. Use your discretion to determine which method makes the most sense for your location.

Manual Reporting

If you have 20 members or fewer, we recommend entering data directly into our Data Entry Page for each member at your location instead of using the file upload process.

Step	Action
1	Navigate to a member's Data Entry Page by clicking the NYSLRS ID found in the View All record table at the bottom of the Summary Page screen. *(The NYSLRS ID will be hyperlinked to that member's Data Entry Page.)*
2	Enter the amounts, including cents, for the following: • Non-Overtime Earnings 2020-21 • Overtime Earnings 2020-21 • Non-Overtime Earnings 2021-22 • Overtime Earnings 2021-22 **Note: Some values may be N/A and read-only. Do not enter information into these fields.**
3	Verify that the information entered is accurate, then click the "Save" button. If there are errors for that member, an error message will appear on the screen. Go back to the Data Entry Page and correct the mis-entered amount, then click the "Save" button.
4	Click "Return to Search" to move onto the next member.
5	After entering data for all members, return to the Summary Page.
6	Click the "Submit" button and all pages will become read-only.

File Upload

If you have more than 20 members, we recommend using the file preparation and upload process.

Click the “Download” button on the top right corner of the ‘View All’ record table at the bottom of the Summary Page screen.

Once the Excel file opens, follow the steps below to correct the formatting of the data in your file. By making these formatting changes, you will be able to seamlessly upload your file. (You may have to open the Excel file from the downloads folder on your computer.)

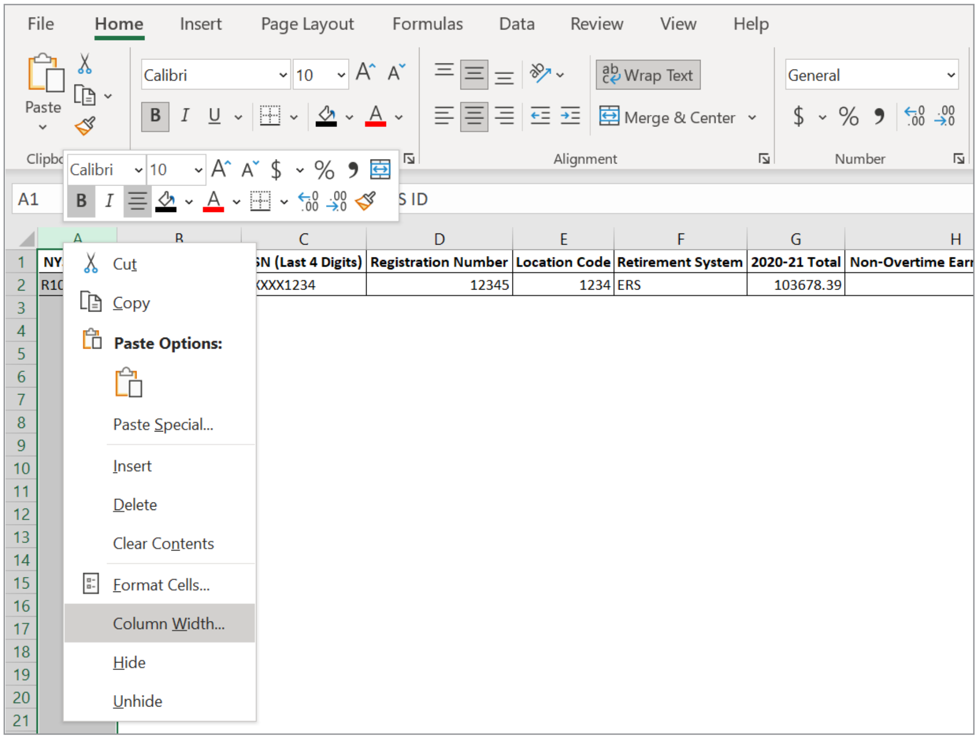
Step	Action
1	Make sure the location code and registration number are the correct number of digits long. The Location Code must be a five-digit numerical value. If the leading zeros do not appear (Ex. “00010” shows up as “10” in the Location Code), follow these steps: 1. Right-click on the “E” to highlight Column E (Location Code). A dropdown menu will appear. 2. In the dropdown, click “Format Cells.” 3. A pop-up window will appear. Under ‘Category’ on the leftmost side of that window, click on “Custom.” 4. Select “0” under the ‘Type’ section. (This is important. Do NOT select “0.00” or any other variation.) 5. In the text box directly under ‘Type,’ enter four (4) additional zeros (a total of five [5] zeros: “00000”). 6. Click “OK.” All Location Codes will now be five digits long, including leading zeros.
2	Delete dashes from the SSN. “XXX-XX-1234” should be changed to “XXXXX1234”. Quick Tip: If you are doing this for many members, follow these steps: 1. Click on the “C” to highlight Column C (SSN [Last 4 Digits]). 2. Press the CTRL and F keys on your keyboard. This will open a small window called ‘Find and Replace.’ 3. Select the ‘Replace’ tab in that window. 4. In ‘Find what,’ enter just a hyphen (-) with no spaces. 5. Click “Replace All,” and then “OK” in the next pop-up message. The SSN dashes will be removed, and you can click “Close” in the pop-up window to continue working on the spreadsheet.
3	Delete the ‘Error’ column (Column M). • Right-click on the “M” to highlight Column M. • In the dropdown menu, click “Delete.”

Step | **Action**

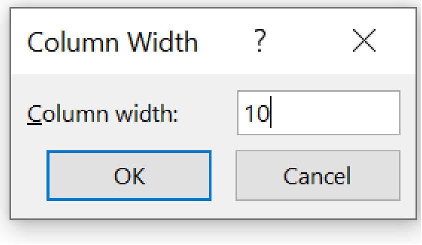
4

Format each column's width to properly fit the .prn file format.

- Right-click on the "A" to highlight Column A (NYSLRS ID). A dropdown menu will appear.
- Select "Column Width…" from the dropdown menu.


File
Home
Insert
Page Layout
Formulas
Data
Review
View
Help
Paste
Calibri
10
Wrap Text
Merge & Center
General
Alignment
Number
A1
S ID
Cut
Copy
Paste Options:
Paste Special...
Insert
Delete
Clear Contents
Format Cells...
Column Width...
Hide
Unhide
SN (Last 4 Digits)
Registration Number
Location Code
Retirement System
2020-21 Total
Non-Overtime Earı
XXX1234
12345
1234
ERS
103678.39

- In the pop-up window, enter "10" and click "OK."


Column Width
?
OK
Cancel

Column width: 10

- Repeat these steps for Columns B-L. Refer to the table below for each Column Width value.

Column Label	Column Width
A	10
B	33
C	9
D	8
E	5
F	1
G	10
H	10
I	10
J	10
K	10
L	10

Step	Action
5	After column widths are set, enter the amounts, including cents, for the following columns: • Non-Overtime Earnings 2020-21 • Overtime Earnings 2020-21 • Non-Overtime Earnings 2021-22 • Overtime Earnings 2021-22 **Note: You must enter 0 when there are no earnings to report. If you submit the file with blank cells, it may fail to upload.**
6	Once the data is entered, save the file: • Go to the 'File' tab in Excel. • Click "Save As." • 'Save as type' MUST be set to "Formatted Text (Space delimited) (*.prn)." • The file name must be shorter than 53 character long, including the .prn extension. • Click the "Save" button.
7	Then, upload the file: • On the Summary Page, click "Browse," then "Choose File" to search for your saved file. • After you've located the file, click "Open" or double-click the file. • Once the file is loaded, click "Upload" to upload file into the browse bar. • Click "Upload" on the Summary Page to begin the file upload process.

How To Clear Errors

After the file upload process begins, click the "Refresh" button below the browse bar to see the upload progress.

Once file has been successfully uploaded, you will see information populated for the Non-Overtime Earnings and Overtime Earnings columns.

- Members without any errors will have "N" in the 'Error' column.
- Members that have one or more errors that need to be addressed will have "Y" in the 'Error' column. For example, if the Non-Overtime Earnings 2020-21 and Overtime Earnings 2020-21 do not add up to 2020-21 Total, you will see "Y" in the 'Error' column and will need to resolve that error before clicking the "Submit" button.