

# Retirement Online User Guide

## Employment History and Service Credit Purchase

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### Introduction

This user guide will outline how to view your employment history with NYSLRS, request additional service credit and manage your service credit purchase accounts in *Retirement Online*.

### View Employment & Earnings

Sign in to *Retirement Online* and follow the steps below.

| Step | Action                                                                                                                                                                                                                                                |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | In the <i>My Account Summary</i> section, click <b>View Employment &amp; Earnings</b> .                                                                                                                                                               |
| 2.   | The <i>My Recent Employment Summary</i> page will open. This page will display your most recent employment record.<br><i>If you have held more than one job in the last five fiscal years, you will need to use the arrows to view each instance.</i> |
| 3.   | Click <b>Close</b> to return to the <i>Retirement Online Account Homepage</i> .                                                                                                                                                                       |

### Request Additional Service Credit

Sign in to *Retirement Online* and follow the steps below.

| Step | Action                                                                                     |
|------|--------------------------------------------------------------------------------------------|
| 1.   | In the <i>My Account Summary</i> section, click <b>Request Additional Service Credit</b> . |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2.   | <p>The <i>Request Additional Service Credit</i> page will open.</p> <p>Enter the <b>Estimated Start Date</b> and <b>Estimated End Date</b> of your missing employment history using the MM/DD/YYYY format.<br/> <i>You may also use the Calendar icon to select a date.</i></p> <p>Click the <b>Look Up</b> icon next to the <b>Employer</b> field. The <i>Look Up Employer</i> pop-up will appear. Select the appropriate <b>Description</b>.<br/> <i>To further narrow your search, use the Description and Location Code fields to enter information regarding your previous employer.</i></p> <p>Enter any additional <b>Comments</b> that may be helpful in verifying your employment, then click <b>Next</b>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 3.   | <p>The <i>E-Signature</i> page will open. Check the box next to <b>'I certify that the information...'</b>, then click <b>Submit</b>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 4.   | <p>The <i>Message</i> pop-up will appear.</p> <p>If you have supporting documentation to upload, click <b>Yes</b>.<br/> <i>Documents such as payroll records, W -2 forms, Social Security earnings reports or other documents associated with this employment should be uploaded. Generally, providing these documents is not required, but may assist NYSLRS with processing your request.</i></p> <ul style="list-style-type: none"> <li>• The <i>Upload Your Documents</i> pop-up will appear. Click <b>Browse</b>.</li> <li>• The <i>File Attachment</i> popup box will appear. Click <b>Browse...</b> to search your device for the document related to your service credit request.</li> <li>• The <i>Choose File to Upload</i> window will appear. Click the file name of the document you are uploading.<br/> <i>Only Portable Document Formats (PDFs) that are 1 megabyte (MB) or smaller can be uploaded. No other file format will be accepted. Please do not attach any files within the PDF as an embedded document.</i></li> <li>• Click <b>Open</b>.</li> <li>• You will return to the <i>File Attachment</i> pop-up box. Click <b>Upload</b>.</li> </ul> <p>If you do not have any supporting documentation to upload, click <b>No</b>.</p> |
| 5.   | <p>The <i>Confirmation</i> page will open. Click <b>Close</b> to return to the <i>Retirement Online Account Homepage</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

## Make a One-Time Service Credit Payment

Sign in to *Retirement Online* and follow the steps below.

| Step | Action                                                                                                                                      |
|------|---------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | In the <i>My Account Summary</i> section, click <b>Manage Service Credit Payments</b> .                                                     |
| 2.   | The <i>Service Credit Purchase Accounts</i> page will open; click <b>Make a Payment</b> next to the account you want to apply a payment to. |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3.   | The <i>One-Time Service Credit Purchase Payment Notice</i> page will open. Check the box next to ' <b>I hereby confirm that I...</b> ', then click <b>Next</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 4.   | <p>The <i>Make a One-Time Service Credit Purchase Payment</i> page will open.</p> <p>To specify an overall amount to pay to your account(s):<br/> <i>Retirement Online will apply this amount to mandatory service first, then to any optional balances.</i></p> <ul style="list-style-type: none"> <li>To pay off the full balance of your accounts, click <b>Projected Total Balance</b>.</li> <li>To enter a different amount, click <b>Other Amount</b> and enter the amount you would like to pay.</li> </ul> <p>To specify accounts to pay:</p> <ul style="list-style-type: none"> <li>Click the <b>check box</b> next to the service credit purchase you want to make a payment on.</li> <li>Enter the <b>Payment Amount</b>.</li> </ul> |
| 5.   | <p>In the <i>Payment Information</i> section, populate the following:</p> <ul style="list-style-type: none"> <li>Select <b>Checking</b> or <b>Savings</b> to indicate your account type.</li> <li><b>Routing Number</b><br/> <i>Once you enter the routing number, the institution's name will appear.</i></li> <li><b>Account Number</b></li> <li><b>Re-Enter Account Number</b></li> </ul> <p>Click the box '<b>I confirm that all the...</b>' to confirm your payment information. Click <b>Submit</b>.</p>                                                                                                                                                                                                                                  |
| 6.   | <p>The <i>Payment Confirmation</i> pop-up will appear.</p> <p>To complete your payment and return to your <i>Retirement Online Account Homepage</i>, click <b>Close</b>.</p> <p>To cancel your payment, click <b>Cancel Payment</b>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

## Payroll Deductions

Sign in to *Retirement Online* and follow the steps below.

| Step | Action                                                                                        |
|------|-----------------------------------------------------------------------------------------------|
| 1.   | In the <i>My Account Summary</i> section, click <b>Manage Service Credit Payments</b> .       |
| 2.   | The <i>Service Credit Purchase Accounts</i> page will open. Click <b>Payroll Deductions</b> . |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3.   | <p>The <i>Start/Modify Payroll Deductions</i> page will open.</p> <p>To change your payroll deduction amount to pay, click <b>Specify Amount to Pay</b>.</p> <ul style="list-style-type: none"> <li>The <b>Amount</b> box will appear; enter the new amount you would like to pay.<br/><i>The new amount must be more than the minimum payment.</i></li> <li>Click <b>Calculate</b>.<br/><i>The <b>New Payment Amount</b>, <b>New Expected Payment End Date</b> and <b>Estimated Number of Paycheck Deductions</b> will update based on the amount you have entered.</i></li> </ul> <p>To change your payroll deduction by end date, click <b>Specify Payment End Date</b>.</p> <ul style="list-style-type: none"> <li>The <b>Specified Date</b> box will appear; enter the new date you would like to finish your payroll deductions by.<br/><i>The date must be the last day of a month and you cannot exceed the maximum end date.</i></li> <li>Click <b>Calculate</b>.<br/><i>The <b>New Payment Amount</b>, <b>New Expected Payment End Date</b> and <b>Estimated Number of Paycheck Deductions</b> will update based on the amount you have entered.</i></li> </ul> <p>Click <b>Submit</b> to change your payroll deduction.<br/><i>If you do not want to change your payroll deduction at this time, click <b>Cancel</b>. To start over, click <b>Clear</b>.</i></p> |
| 4.   | <p>The <i>Loading</i> page will open.<br/><i>Please wait while we process your request. Do not X out of this process or close your browser until you receive confirmation that your request has been processed.</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 5.   | <p>The <i>Confirmation</i> page will open. Click <b>Close</b> to return to the <i>Retirement Online Account Homepage</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

## View Online Payment History

Sign in to *Retirement Online* and follow the steps below.

| Step | Action                                                                                                                                                                                                                                                                                      |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | <p>In the <i>My Account Summary</i> section, under <i>Membership &amp; Service Credit</i>, click <b>View Online Payment History</b>.</p>                                                                                                                                                    |
| 2.   | <p>The <i>Online Payment History</i> page will open. Review your online payment history.<br/><i>This page will display a history of any one-time payments you have made in Retirement Online.</i></p> <p>To return to the <i>Retirement Online Account Homepage</i>, click <b>Back</b>.</p> |