

Retirement Online User Guide

Managing My Profile Information

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Introduction

This user guide outlines the various transactions you can take to keep your personal information updated in *Retirement Online*. These transactions include updating your demographic information (name, address, phone, email) as well as updating your preferred method of communication with NYSLRS.

Update Name

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

Step	Action
1.	In the <i>My Profile Information</i> section, click update next to your Name .
2.	The <i>Name Change</i> page will open. Click Edit Name in the <i>New Name</i> section.
3.	The <i>English Name Format</i> pop-up will appear. Update your name in the applicable fields. Click OK . <i>The Refresh Name button will update the name that appears in the 'Display Name' field, but it will not save your changes. This allows you to preview your updates before saving your changes. You need to click the OK button to save.</i>
4.	The <i>Name Change</i> page will open. Your name will only be updated in the <i>New Name</i> section at this time. <i>You will be required to submit any necessary documentation to NYSLRS before your name change can be processed.</i> To update your preferred name, click Edit Name in the <i>Preferred Name Section</i> . The <i>English Name Format</i> pop-up will appear. Update your Preferred Name , then click OK . <i>You do not need to submit documentation to update your preferred name.</i> To upload the required documentation, click Browse .
5.	The <i>File Attachment</i> pop-up will appear. Click Choose File . Locate the completed document on your device and click Open . <i>You can only upload a PDF file that is 1 Megabyte (MB) or smaller. No other format will be accepted. Do not attach or embed any files within the PDF.</i>
6.	You will return to the <i>File Attachment</i> pop-up. Click Upload .

Step	Action
7.	You will return to the <i>Name Change</i> page. Click Submit .
8.	The Save Confirmation page will open. Click OK to return to the <i>Retirement Online Account Homepage</i> . <i>Your request has been received. Please allow 4-6 weeks for the review process to be completed. You will receive a notification when your name change has taken effect.</i>

Update Address

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

Step	Action
1.	In the <i>My Profile Information</i> section, click update next to Address .
2.	The <i>Home Address</i> page will open. Click the Edit icon.
3.	The <i>Edit Home Address</i> page will open. To schedule your address change for a later date, click the Calendar icon next to the <i>Change As Of</i> field to select a date. <i>You can also manually enter a date in the Change As Of field without using the Calendar icon.</i> If you need to change the country, click Change Country . <i>Additional steps will apply.</i> To update your address, populate the following fields: • Address 1 • City • State • Postal Zip Code Click Save .
4.	A <i>Message</i> pop-up will appear. It will present the address in the format used by the United States Postal Service (USPS). If you click Yes, the address will update to the suggested USPS version. If you click No, the address will stay as entered. Click Yes or No . <i>Either selection will take you to the Save Confirmation page.</i>
5.	The <i>Save Confirmation</i> page will open. Click OK to return to the <i>Retirement Online Account Homepage</i> .

Update Telephone

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

Step	Action
1.	In the <i>My Profile Information</i> section, click update next to your Telephone .
2.	The <i>Phone Numbers</i> page will open. To edit the phone numbers NYSLRS has on file, complete the following steps: - To remove a phone number, click the Delete icon. - To add a phone number, click Add Phone Number. - A new line will appear under your existing phone number. Select the Phone Type and enter the Telephone number. <i>When entering your phone number, please do not include any parentheses [()], dashes [-], or slashes [/]. This field will format the phone number automatically after you click Save.</i> - To make this your preferred phone number, click the Preferred checkbox. <i>If you listed more than one phone number, you will only receive phone calls at the preferred phone number.</i> To edit your security code phone information, complete the following steps: - To remove a security code phone number, click the Delete icon. - To add a security code phone number, click Edit. - Enter the phone number. - For mobile phones, select a Delivery Method. - Click Validate. - The <i>Enter Your Security Code</i> pop-up will appear. Type in the security code that you receive on your phone. Click Submit. To save your changes, click Save.
3.	The <i>Save Confirmation</i> page will open. Click OK to return to the <i>Retirement Online Account Homepage</i> .

Update Email

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

Step	Action
1.	In the <i>My Profile Information</i> section, click update next to Email .
2.	The <i>Email Address</i> page will open. Update your email address and click Save .
3.	The <i>Save Confirmation</i> page will open. Click OK to return to the <i>Retirement Online Account Homepage</i> .

Update Contact By

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

Step	Action
1.	In the <i>My Profile Information</i> section, click update next to Contact By .
2.	The <i>Correspondence Preference</i> page will open. Select your Correspondence Preference , then click Save to return to the <i>Retirement Online Account Homepage</i> .

Update Member Annual Statement

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

Step	Action
1.	In the <i>My Profile Information</i> section, click update next to Member Annual Statement by .
2.	The <i>MAS Preference</i> page will open. Select your MAS Preference , then click Save to return to the <i>Retirement Online Account Homepage</i> .

Update Retiree Annual Statement

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

Step	Action
1.	In the <i>My Profile Information</i> section, click update next to Retiree Annual Statement by .
2.	The <i>RAS Preference</i> page will open. Select your RAS Preference , then click Save to return to the <i>Retirement Online Account Homepage</i> .

Update 1099-R Tax Form Delivered By

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

Step	Action
1.	In the <i>My Profile Information</i> section, click update next to 1099-R Tax Form Delivered by .
2.	The <i>1099-R Tax Form Delivery</i> page will open. Select your 1099-R Tax Form Delivery by preference, then click Save to return to the <i>Retirement Online Account Homepage</i> .