








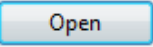



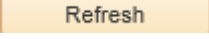
Legacy Regular File Upload

This quick guide shows you (as an employer reporting uploader) how to upload a regular monthly report using the Legacy reporting format within *Retirement Online*.

“Legacy” refers to the current format used when submitting reports through Retirement Internet Reporting (RIR).

Step	Action
1	Click the Access Reporting Dashboard button. 
2	The <i>Employer Reporting Dashboard</i> page will appear.
3	To view a list of all your available location codes, click the Look Up Location icon next to the location field. If you have access to more than one location code, one will display by default, but you may select a different code to report for a different location. If you only have access to one location code, it will be entered automatically. This is a required field. 
4	The Look Up Location pop-up box will appear.
5	Click an option from the list for the location that you want to report.
6	Click the Go button. 
7	A list of previous reports for this location will appear. Click the File Upload button. 
8	The <i>File Upload</i> page will appear. The location code will carry over from the <i>Employer Reporting Dashboard</i> page. All fields on this page are required.
9	The Report Type will default to regular. Click the Regular button. 
10	Click the Choose a date icon next to the Report Date field. You can also manually enter a date in the Report Date field without using the Choose a date icon. Use the MM/DD/YYYY format. You must choose the last date of the month for which you are reporting. 
11	Click in the Total Days field. 
12	Enter the total days you are reporting for your employees on this report in the Total Days field. You cannot leave this field blank as this is a required field.

Step	Action
13	Click in the Total Earnings field. <input data-bbox="690 184 1003 216" type="text" value="\$0.00"/>
14	Enter the total of all the earnings you are reporting for your employees on this report in the Total Earnings field. You cannot leave this field blank as this is a required field.
15	Click in the Total Contributions field. <input data-bbox="755 405 1068 436" type="text" value="\$0.00"/>
16	Enter the total contributions you are reporting for all your employees on this report in the Total Contributions field. You cannot leave this field blank as this is a required field.
17	Click in the Total Loan Payments field. <input data-bbox="779 625 1092 657" type="text" value="\$0.00"/>
18	Enter the total of all loan payments you are reporting for your employees on this report in the Total Loan Payments field. You cannot leave this field blank as this is a required field.
19	Click in the Total Service Credit Payments field to enter your arrears. <input data-bbox="1149 846 1463 877" type="text" value="\$0.00"/>
20	Enter the total of all the service credit payments (arrears) you are reporting for your employees on this report and enter the total service credit payments amount in the Total Service Credit Payments field. You cannot leave this field blank as this is a required field.
21	Click in the Total Payments field. <input data-bbox="706 1098 1019 1129" type="text" value="\$0.00"/>
22	Your entry for the Total Payments field should be the sum of all contributions, loans, and service credit payments. You cannot leave this field blank as this is a required field.
23	Click in the Total Record Count field. <input data-bbox="755 1318 841 1350" type="text" value="0"/>
24	Enter the total number of rows you are reporting in the file in the Total Record Count field. This does not include headers, footers or blank rows as these should be removed before the file is uploaded. You cannot leave this field blank as this is a required field.
25	To select the file you would like to upload, click the Browse button. <input data-bbox="1101 1581 1276 1612" type="button" value="Browse"/>
26	The File Attachment pop-up will appear.
27	Click the Browse... button. <input data-bbox="625 1791 784 1822" type="button" value="Browse..."/>
28	The Choose File to Upload pop-up will appear.

Step	Action
29	Click the file name of the report file you are uploading. <i>Retirement Online</i> will only accept the following file formats for legacy reports: .prn, .txt, .rpt, .dat, and .csv.
30	Click the Open button. 
31	You will return to the File Attachment pop-up.
32	Click the Upload button. 
33	Click the Initiate Report button. This will upload your report to <i>Retirement Online</i> . 
34	A Message pop-up will appear confirming the file has been successfully uploaded.
35	Click the OK button. 
36	On your <i>Employer Reporting Dashboard</i> page, scroll down until you see the 'Submission Status Details' section to view the status of your upload.
37	The uploaded report will show up as a new row at the top of the 'Submission Status Details' section of the <i>Employer Reporting Dashboard</i> page.
38	Click the Refresh button to see the status of the report you've just uploaded. The status will start as Processing and change to: No Success, Failed with File Errors, or Ready for Submission. The amount of time the file will take to post will vary depending on the file size. Once the submission status shows that you have successfully uploaded the report, the next step will be to review any file errors, which can be found in the Legacy Regular File Upload Formatting Validation guide. 
39	You have successfully uploaded a legacy regular monthly report. <i>End of Procedure.</i>