Legacy Regular File Upload

NYSLRS
New York State and Local Retirement System

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. Access Reporting Dashboard
2	The *Employer Reporting Dashboard* 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. Go
7	A list of previous reports for this location will appear. Click the **File Upload** button. File Upload
8	The *File Upload* page will appear. The location code will carry over from the *Employer Reporting Dashboard* 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. 0
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. $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. $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. $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. $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. $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. 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. Browse
26	The File Attachment pop-up will appear.
27	Click the **Browse...** button. 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. *Retirement Online* will only accept the following file formats for legacy reports: .prn, .txt, .rpt, .dat, and .csv.
30	Click the **Open** button. Open
31	You will return to the File Attachment pop-up.
32	Click the **Upload** button. Upload
33	Click the **Initiate Report** button. This will upload your report to *Retirement Online.* Initiate Report
34	A Message pop-up will appear confirming the file has been successfully uploaded.
35	Click the **OK** button. OK
36	On your *Employer Reporting Dashboard* 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 *Employer Reporting Dashboard* 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. Refresh
39	You have successfully uploaded a legacy regular monthly report. *End of Procedure.*