



Reporting Tips

Courtesy of the New York State Teachers' Retirement System



August 2016

Holdover Days from Prior Year

Remember to report days which should have been reported to NYSTRS last year. Pay should be reported in the Holdover field (pay category – E) but the days will need to be posted manually. Please call your employer reporting contact directly to ensure the adjustments are made accurately.

Director Titles

Reporting of director titles often cause confusion as they typically belong to the New York State and Local Employees' Retirement System. However, there are a few exceptions. Generally, for example, the titles of Director of Special Education and Director of Pupil Services are reportable to NYSTRS. Director titles reportable to NYSTRS require a SDL certificate; be more than 50 percent instructional in nature; and, not be a classified position. If you need a determination on a title, please contact the [New York State Education Department](#).

Transferring Memberships from One Retirement System to Another

Occasionally a change in position by a teacher or administrator requires that service and salary be reported to a different retirement system. As long as the individual's membership in a retirement system is active, it can be transferred to another New York State retirement system, but there are two important steps that need to be followed:

1. Establish a membership immediately in the new system; and,
2. Contact the other retirement system to have the membership transferred.

Step 1 is **critical** as NYSTRS is unable to transfer a membership until there is an active membership in another New York State system. For NYSTRS, a completed *Request for Direct Transfer of Membership* ([TRF-3](#)) form is required to initiate the transfer out. Initially the member will be assigned to the current tier, but once the transfer is complete all service and the original date of membership will be reestablished.