



# Reporting Tips

*Courtesy of the New York State Teachers' Retirement System*



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## July 2018

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### Year-End Reports

Year-end reports will be available in ESA once the System has processed your district's June monthly report. When available, please complete the Year-End Certification Report at your earliest convenience.

This form is prefilled with the monthly reporting data you provided us. We offer this service to make the process easy and efficient for you. This online process eliminates the need for you to complete and mail a paper form to the System.

### Handling New and Transferring Memberships

Before adding your new employees within NYSTRS' [Employer Secure Area](#) (ESA), visit the ESA's membership verification page (found under the Membership tab) to determine:

- If the new hire is already a NYSTRS member, in which case a membership application is **not** required;
- If already a member, his or her membership tier; and,
- If member contributions are required. (**Please note:** The membership verification application will provide a notification if projected earnings are required for any Tier 6 members.)

Eligible new hires who are not NYSTRS members should complete an [Application for Membership](#) (NET-2), available on the [Forms](#) page at [NYSTRS.org](#). Be sure to send NYSTRS the completed membership applications so we have on file current address information and beneficiary designations.

If you have employees with an active membership in another NYS retirement system, please advise them to contact the other retirement system to determine if a transfer is beneficial to them. To do so, the member **must** make a written request for transfer (a.k.a., a direct transfer) from the former retirement system. Any member contributions required as a result of a new NYSTRS membership cannot be stopped until we have received a certification form from the other retirement system. Refunds of any excess contributions are only made back to the beginning of the year in which the certification form is received from the other retirement system. Questions regarding Transfers should be directed to (800) 348-7298, Ext. 6040.

### Updated Beneficiary Designation Form for NYSTRS Members

NYSTRS' [Designation of Beneficiary For In-Service or Post-Retirement Paragraph 2 Death Benefit](#) (NET-11.4) form was updated in May 2018. **Please discard any older versions of this form you may have.** As our forms are updated frequently, we recommend that you only print forms as you need them. You can find the most up-to-date version of all NYSTRS forms on our website at [NYSTRS.org](#).

## Reporting a Member or Retiree Death

Employers should advise NYSTRS when an active member or retiree dies. The information you provide will help facilitate a timely payment of any death benefit which may be due the individual's beneficiary or estate.

The [Notification of Death of Member or Retiree](#) (RET-62) form enables employers to report this information to NYSTRS. You may download and print the form by clicking the link above or by calling us at (800) 348-7298, Ext. 6220 and requesting the form be mailed to you.

### **To Report an Active Member Death:**

**Phone:** (800) 348-7298, Ext. 6110

**Fax:** (518) 431-8797

### **To Report a Retired Member Death:**

**Phone:** (800) 348-7298, Ext. 6140

**Fax:** (518) 431-8788

*These [Reporting Tips](#) are available on the [Employers](#) page at [NYSTRS.org](#).  
Contact us at (800) 348-7298, Ext. 6220 or [employer@nystrs.org](mailto:employer@nystrs.org) with any questions about the Tips.*