

Enrollment Guide for ERS/TRS and PFRS Retirement Plans

This guide has been designed to assist new employees with enrolling in NYS Employees' Retirement System (ERS)/NYS Teachers' Retirement System (TRS), and New York State Police and Fire Retirement System (PFRS). If you have not made a final decision on the retirement system, there are resources to help you along the way:

- Visit the SUNY website at www.suny.edu/retirement/
- Call Customer Service at **866-271-0960** if you need help enrolling

As a new employee of the State University of New York (SUNY), you can enroll in a retirement system, however, your job classification will determine in which of these systems you are eligible to participate. For more information about your eligibility, please check with your Benefits office.

- **NYS Employees' Retirement System (ERS) or NYS Teachers' Retirement System (TRS)**
- New York State Police and Fire Retirement System (PFRS)

Your Benefits office can provide you with details about each system, and verify which of these systems you are eligible for as well as whether enrollment is mandatory or optional. Eligibility for the Optional Retirement Program (ORP) may or may not apply to your job classification. The instructions in this guide will take you through the process of enrolling in either ETS/TRS or PFRS, which are Defined Benefit Plans.

Take steps now to enroll!

Retirement@Work is the entry point to designate your retirement program election.¹ Once you have selected your retirement plan, you will be required to download and complete an enrollment application, and submit it to your Benefits office. Should you choose to enroll in the SUNY Voluntary 403(b) Savings Plan (VSP), you will enroll and manage your account through Retirement@Work.

1 For first-time users, register and set up your retirement account

If you are already registered, proceed to Part 2 on the next page.

1. Visit retirementatwork.org/suny

Click *Register Now*.

2. Personal information

Enter your Social Security Number and Date of Birth. Click *Next*.

3. Register for online access

Provide the requested personal information and set up your user ID and password. Click *Next*.

4. We need to verify your identity

You will be sent a one-time passcode. Once you reach the **Open and manage your retirement plan** page, proceed to Step 2 in the instructions below.

¹ Retirement@Work is being provided to manage the Voluntary Savings Plan only. Employees may only view and manage their VSP accounts with Retirement@work. The Defined Benefit Plans—NYS Retirement Plans (ERS/TRS or PFRS) as well as the NYS Deferred Compensation Plan—are not administered by Retirement@Work. For additional information on these benefit programs, please refer to www.suny.edu/retirement.

2 Complete your retirement program election

1. Visit retirementatwork.org/suny

Click *Already registered* and log in with your credentials. You may be asked to verify your identity through a one-time passcode.

2. Open and manage your retirement plan

Click on *Enroll now*.

3. Where do you work?

- Click on *Choose employer* and select your employer from the list, then click *Continue*.
- The next screen will review your selection. Click *Confirm*.

4. Please provide the information below

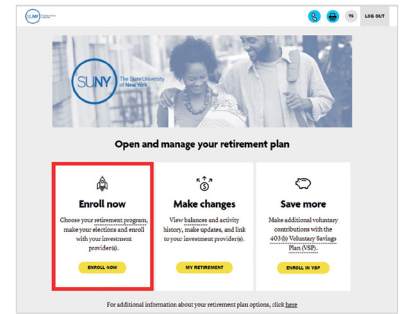
- Enter your phone number and title, then select the retirement program in which you wish to enroll from the **Retirement Program List** dropdown. (Eligibility for the Optional Retirement Program (ORP) may or may not apply to your job classification. Please contact your Benefits office with any questions.)
- Answer yes or no and complete the **retirement program history** questions, if applicable. The program history and prior contract information may impact your pension membership. Use the **Save & Return later** feature if you need to verify this information.
- Review the terms and conditions, and check the box to accept. Click *Confirm*.

5. Submit your elections

Click *Continue*.

6. Thank you for submitting your retirement plan elections

Click on the link to download and print the required application. Once complete, submit it to your Benefits office.



Action required: By selecting ERS/TRS/PFRS, you must take your completed application to your Human Resources office for processing. Enrollment is not complete until your application is processed by the pension system.

Next, if you wish to continue to enroll in the VSP, click *Enroll in SUNY Voluntary Savings Plan* and proceed to the next step. To learn more about the SUNY Voluntary 403(b) Savings Plan, visit www.suny.edu/retirement/vsp/.

