

How to Enroll in a Retirement Plan

Note: This is not to enroll in a Supplemental Retirement plan such as a 40b, Roth 403b, or 457

NYS Employees Retirement System:

- Complete [Retirement Program History Sheet](#).
- Register on <http://www.retirementatwork.org/suny> and select ERS when you are prompted to choose a plan.
- Complete [RS 5420 - NYSLR Membership Application](#) and turn it in to HR.

NYS Teachers Retirement System:

- Complete [Retirement Program History Sheet](#).
 - Register on <http://www.retirementatwork.org/suny> and select TRS when you are prompted to choose a plan.
 - Complete [NYSTRS Membership Application](#) and turn it in to HR.
- **Must be original application as it must be signed by a notary****

Optional Retirement Program:

- Complete [Retirement Program History Sheet](#).
- Register on <http://www.retirementatwork.org/suny> and select ORP when you are prompted to choose a plan.
- You will need to choose your investment provider and it will link you to create an online portal with your provider.
- Once you go through all the steps and submit your enrollment, you are all set and your enrollment request will be sent to HR.

If you have any questions or concerns on enrolling in a retirement plan, please reach out to HR at hr@oswego.edu.