



How to Set Up Your New York Secure Choice Employer Account

1. Register



2. Send contributions



3. Ongoing maintenance



1. Register

Once you receive your unique Access Code, you're ready to start. You'll just need to provide basic information about your employees, payroll process, and banking information. Follow the steps below for detailed instructions.



Set up your business' online account.

Use your company's EIN and unique Access Code to set up your online New York Secure Choice account. We'll provide you with a unique Access Code by email or mail when it's time to register. You can also retrieve your Access Code online.



Create a password.

Enter your business email as your username and create a password.



Add your payroll information.

Identify your payroll provider, if you use one, then share or manually upload your payroll schedules.



Add your company's bank information.

Complete all fields including routing number, bank name, bank account number, and account type.



Add your employee information.

Employees must be at least 18 years old to be eligible for New York Secure Choice. If your payroll provider would like to know what's required, or if you'd like to compile your employee information manually in advance, [download the employee upload template](#) to ensure you include all necessary information.



You can even invite a payroll representative to help you facilitate this process or set up an integration.

Learn more about integrations at www.NewYorkSecureChoice.com/payroll.



2. Send contributions

Once you've added employees, we'll communicate directly with them to explain their options, where they'll have 30 days to opt out or customize their savings rate and investment choices. At the end of the 30-day period, you'll record your employees' choices, begin payroll deductions, and submit contribution information and funding for the employees who choose to stay in the program.

- ✓ Create a new deduction in your payroll system.
- ✓ Create a contribution file or enter the information directly in the employer portal.
- ✓ Enter the contribution on the employer portal.
- ✓ For a quick review of this process, [watch our helpful video](#).

3. Ongoing maintenance

Keep your account up to date.

- ✓ Send payroll for active employees every pay period.
- ✓ Update contribution rates as needed — we'll let you know if employees make a change.
- ✓ Keep employee list up to date — add new employees or mark departed employees as terminated.



For additional resources, including video tutorials and answers to common questions, visit www.NewYorkSecureChoice.com/help