

## **Online Services**

This guide provides step-by-step instructions for the following topics:

- ACTIVATING A PRIMARY AUTHORIZER ACCOUNT (Page 2)
- ASSIGNING TAX CAP/TAX CAP COMPLIANCE/LIMIT ROLES TO AN ACCOUNT (Page 8)
- <u>CREATING ADDITIONAL USER ACCOUNTS</u> (Page 17)

PLEASE NOTE: ALL LINKS, USERNAMES, AND OTHER INFORMATION WITHIN THIS GUIDE ARE FOR DEMONSTRATION PURPOSES ONLY. THIS GUIDE DOES NOT CONTAIN ANY OF YOUR PERSONAL INFORMATION. YOUR ENROLLMENT INFORMATION WILL BE EMAILED TO YOU SEPARATELY.

#### **ACTIVATING A PRIMARY AUTHORIZER ACCOUNT**

**Step 1:** Once your account has been created, you must activate it before you can access any LGSA applications. You will receive two automated emails from the Enrollment system. One email will contain your username and the other a temporary password.

A User Account has been created for you by of New York State Office of the State Comptroller to allow you to access the New York State Office of the State Comptroller's Online Services.

Your User ID is: municipaluser

After you establish your password and complete the errollmen ocess, yo ill be au c zed use our lline ervices.

You will receive a separa can communic. In plaining how to tablish ou pass for and implete the enr iment in ce.

If you have any problems of the poson in you orgo ization who created your account, if applicable, or contact OSC by clicking http://www.osc.state.ny.us ortal/contact.htm or detail 1 c. stact information.

Please do not "Reply" directly to this automatically generated message.

For contact information, click http://www.osc.state.nv.us/portal/contact.htm

A User Account has been created for you by of New York State Office of the State Comptroller to allow you to access the New York State Office of the State Comptroller's Online Services.

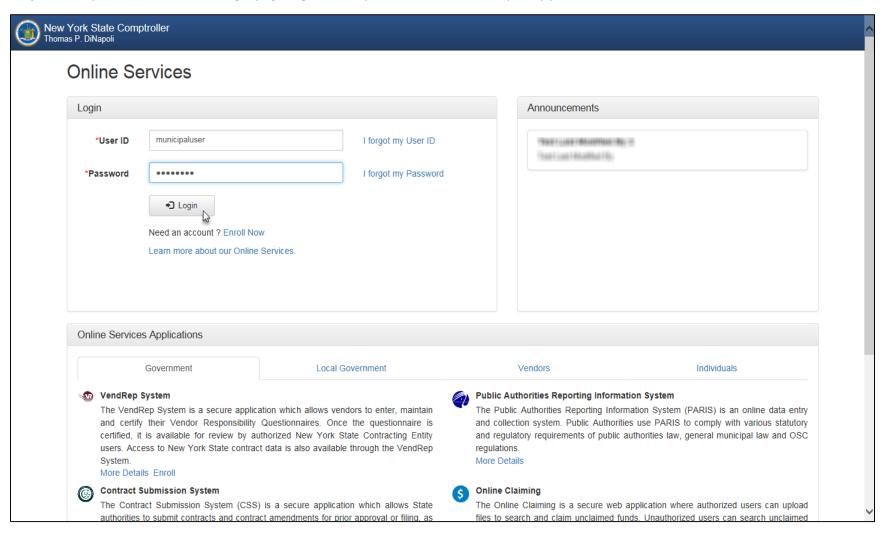
Your temporary password is: Q7tbALz3

To use the New York State Office of the State Comptroller's Or " Services a see logir way you User II" and Pa word and yo will be asked to change your Password at the following secure website:

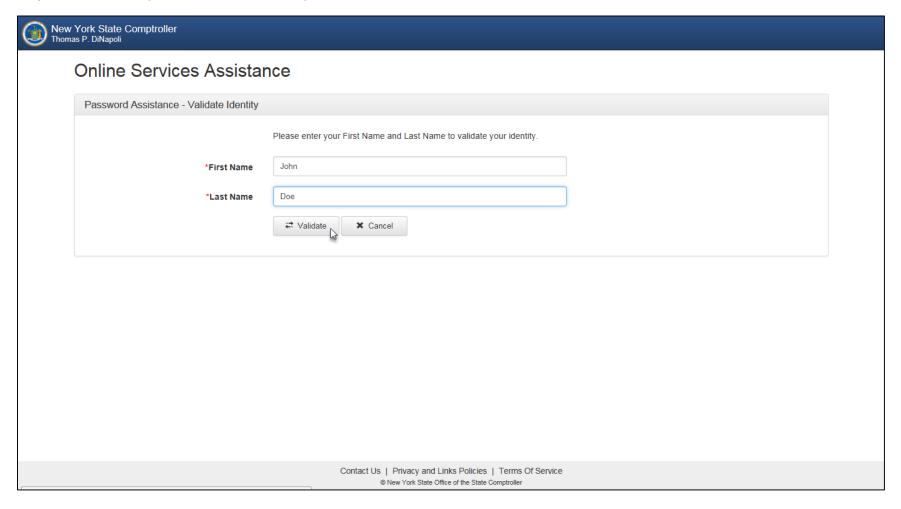
https://portal.osc.state.ny. \_\_nrollment/login

If you have any problems or usuous, please c .tact v vcl cing http://www.osc.state.ny.us/portal/contact.htm for detailed contact information.

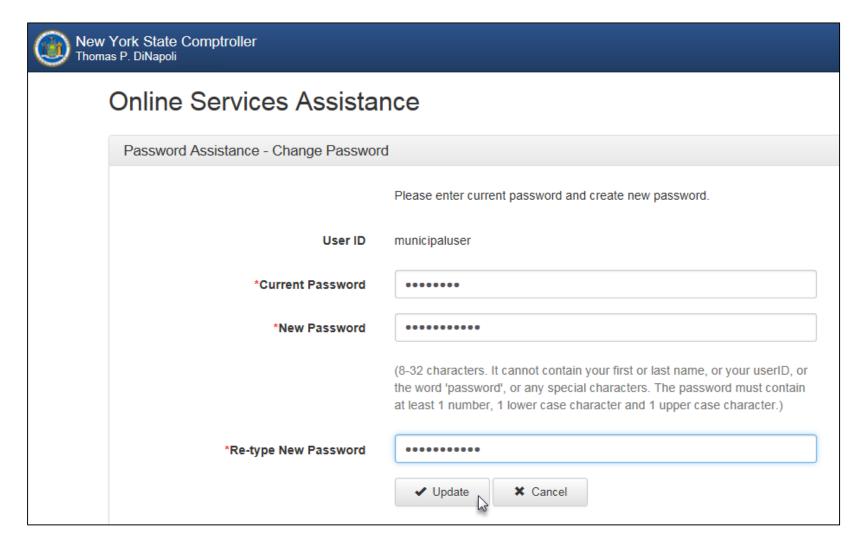
**Step 2:** Once you have reached the login page, sign-in with your username and temporary password.



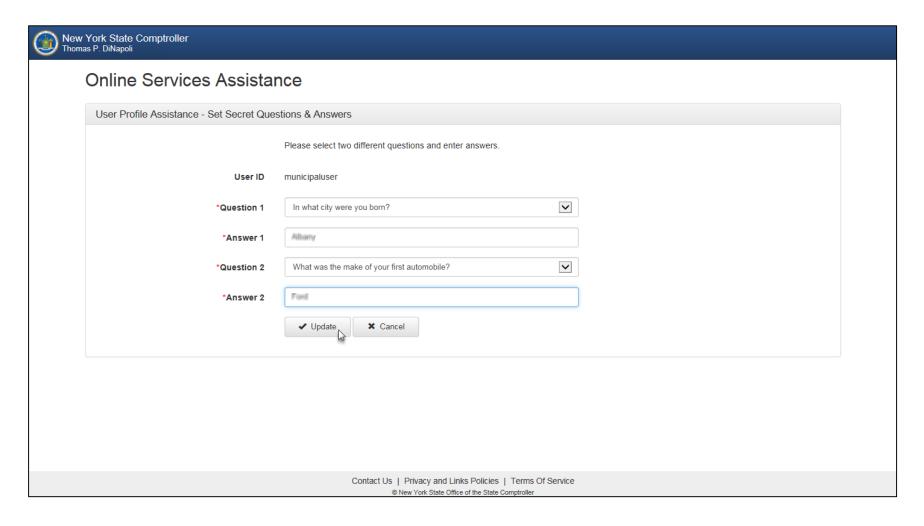
Step 3: On the Identity Validation screen, enter your first and last name. When done, select "Validate."



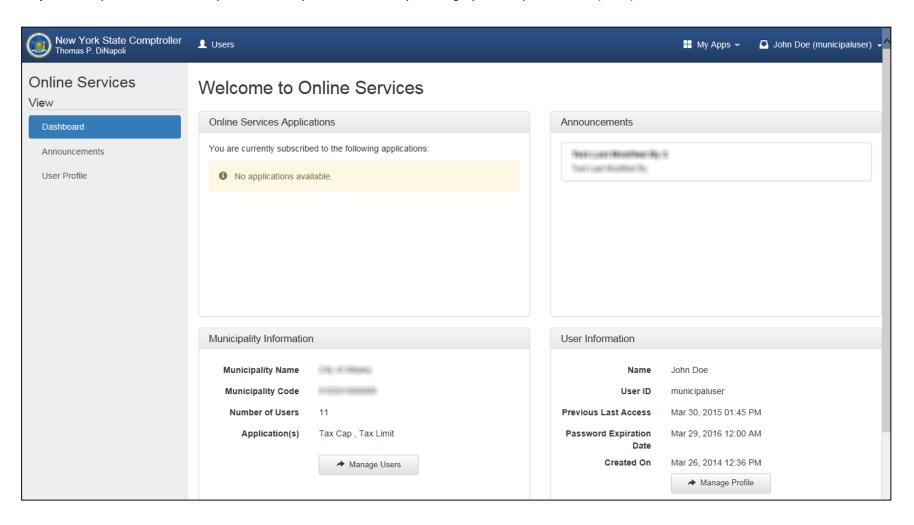
**Step 4:** On the Change Password screen, enter your temporary password in the field labeled "Current Password" and then enter the password you wish to use in the remaining fields. When done, select "Update."



**Step 5:** When prompted, choose and answer two secret questions. When done, select "Update." (Note: these questions will be used in the event you need to recover your password or otherwise validate your identity)

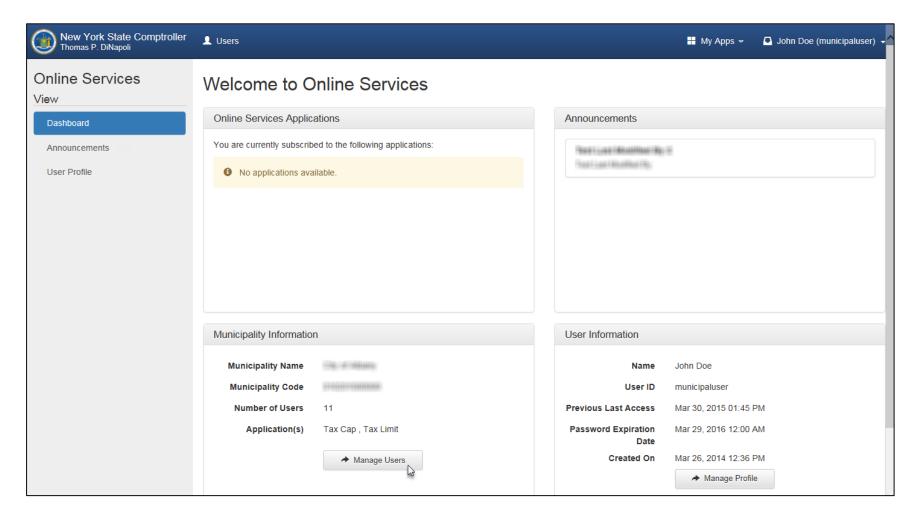


Step 6: Once you have activated your account, you are now ready to assign yourself permissions (roles) and/or create additional users.

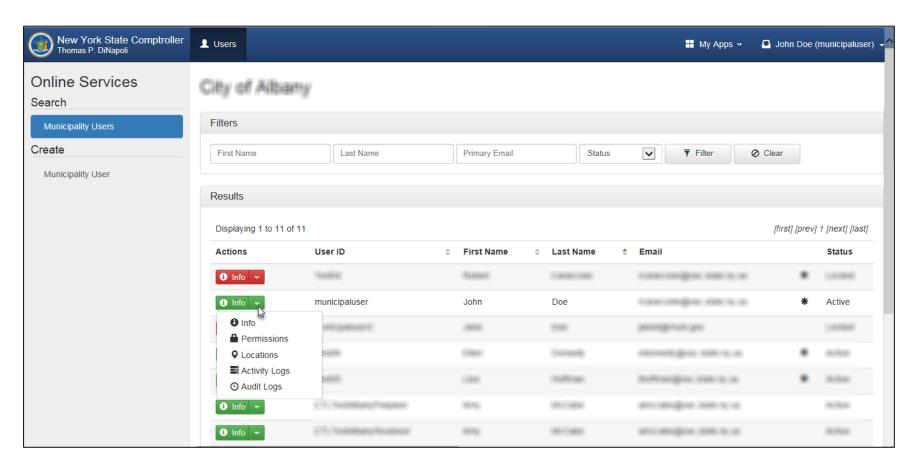


## ASSIGNING TAX CAP/COMPLIANCE/LIMIT ROLES TO AN ACCOUNT (PRIMARY AUTHORIZER ONLY)

**Step 1:** Once you are logged into the website, select "Manage Users" underneath Municipality Information at the bottom. (*Note: if you do not see this option, then you do not have a Primary Authorizer account*)

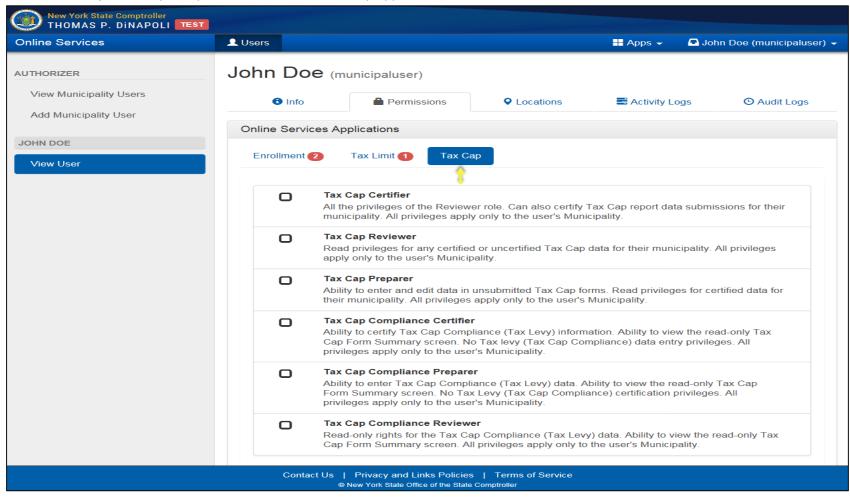


Step 2: On the following screen, click the drop-down arrow next to appropriate username and select "Permissions."



**Step 3:** To assign roles for Tax Cap and/or Tax Cap Compliance, select "Tax Cap" underneath Online Services Applications. **Jump to Step 6 for instructions on how to assign Tax Limit roles.** 

(Note: the roles for Tax Cap Compliance are under the Tax Cap application)



**Step 4:** You now have the ability to assign the roles of Tax Cap and Tax Cap Compliance Reviewer, Preparer and/or Certifier. Below is a description of each role.

## Real Property Tax Cap

**Tax Cap Reviewer:** Can read all Tax Cap reports.

Tax Cap Preparer: Can read all Tax Cap reports and edit all unsubmitted Tax Cap reports.

Tax Cap Certifier: Can read all Tax Cap reports and certify unsubmitted Tax Cap reports.

# Real Property Tax Compliance

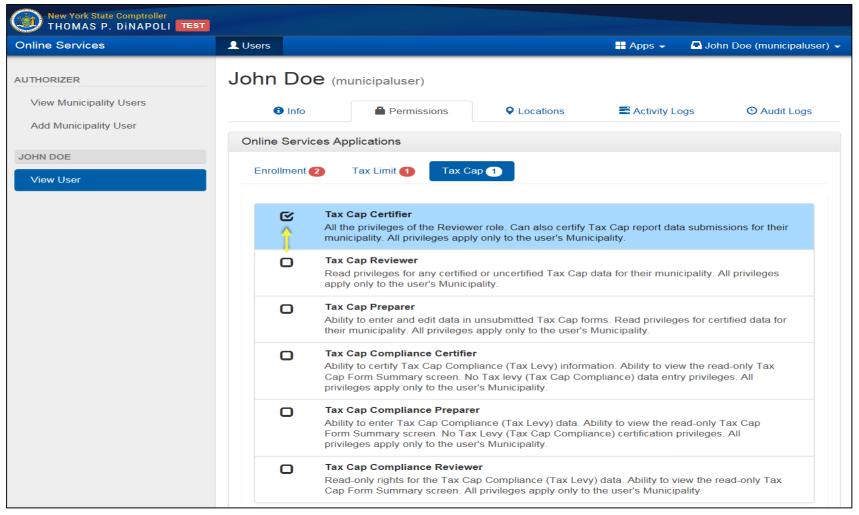
Tax Cap Compliance Reviewer: Can read all Tax Cap Compliance reports.

Tax Cap Compliance Preparer: Can read all Tax Cap Compliance reports and edit all unsubmitted Tax Cap Compliance reports.

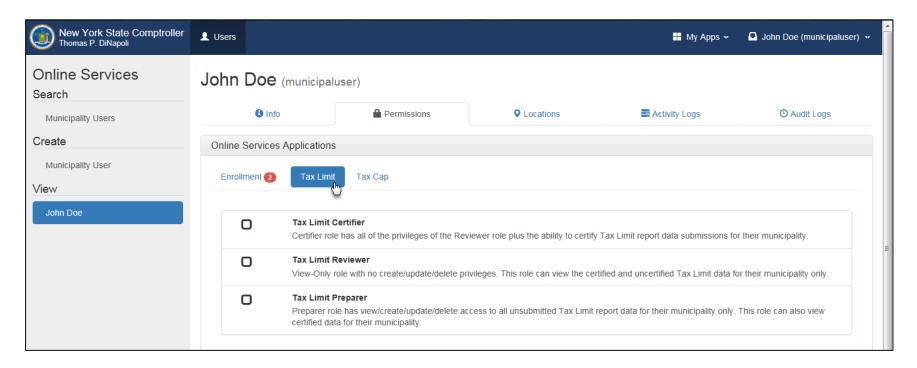
Tax Cap Compliance Certifier: Can read all Tax Cap Compliance reports and certify all unsubmitted Tax Cap Compliance reports.

**IMPORTANT:** For school districts, the Tax Cap Compliance laws only allow the CEO (Superintendent) to complete the certification of the Tax Cap Compliance report. For all other municipalities, the CEO and/or Budget Officer can complete the certification.

**Step 5:** Once you assign a Tax Cap and/or Tax Cap Compliance role, its corresponding box will be check-marked and the role highlighted in blue. (Note: it is recommended that you logout of the website and completely close out of the web browser in order for the changes to take effect)



**Step 6:** To assign roles for Tax Limit, select "Tax Limit" underneath Online Services Applications. (Note: only Counties, Cities and Villages are required to file the Constitutional Tax Limit)



**Step 7:** You now have the ability to assign the roles of Tax Limit Reviewer, Preparer and/or Certifier. Below is a description of each role.

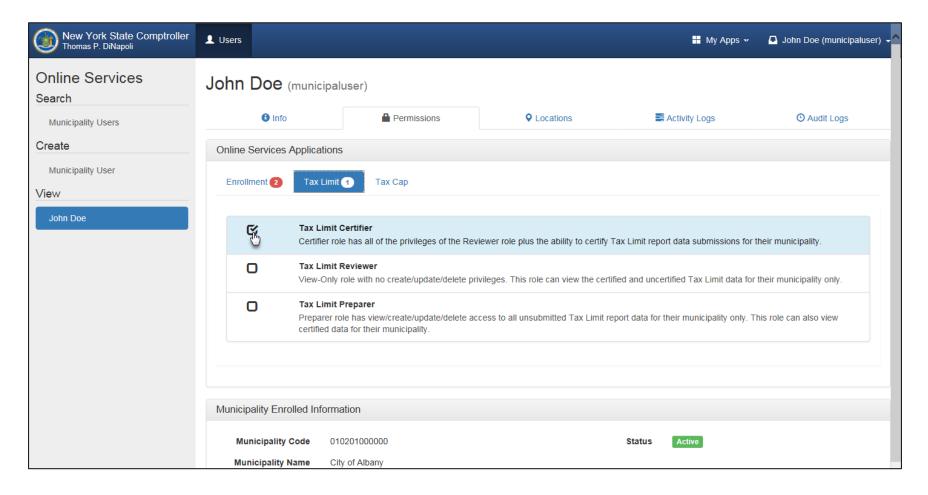
## Constitutional Tax Limit

Tax Limit Reviewer: Can read all certified and uncertified Tax Limit data.

Tax Limit Preparer: Can read all certified and uncertified Tax Limit data and edit all unsubmitted Tax Limit data.

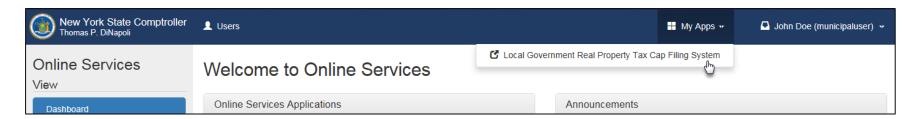
**Tax Limit Certifier:** Can read all certified and uncertified Tax Limit data and certify all unsubmitted Tax Limit data.

**Step 8:** Once you assign a Tax Limit role, its corresponding box will be check-marked and the role highlighted in blue. (Note: it is recommended that you logout of the website and completely close out of the web browser in order for the changes to take effect)

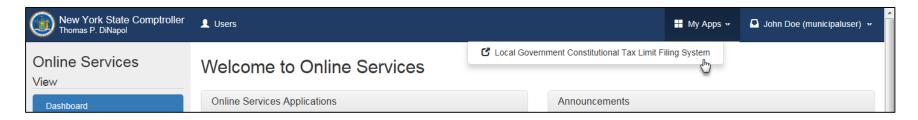


**Step 9:** You can now select the "Local Government Real Property Tax Cap Filing System" and/or the "Local Government Constitutional Tax Limit Filing System" by selecting My Apps at the top. (Note: the Tax Cap Compliance application is located within the Local Government Real Property Tax Cap Filing System)

## My Apps - Local Government Real Property Tax Cap Filing System

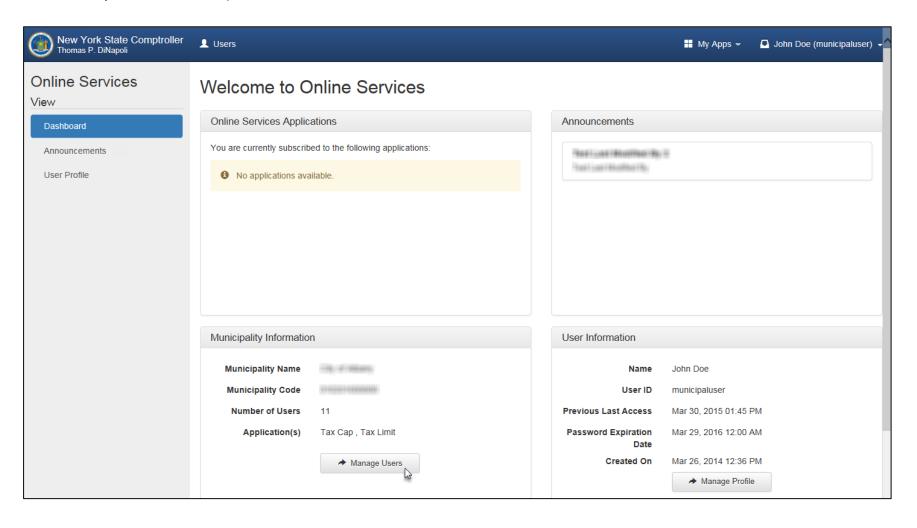


## My Apps – Local Government Constitutional Tax Limit Filing System

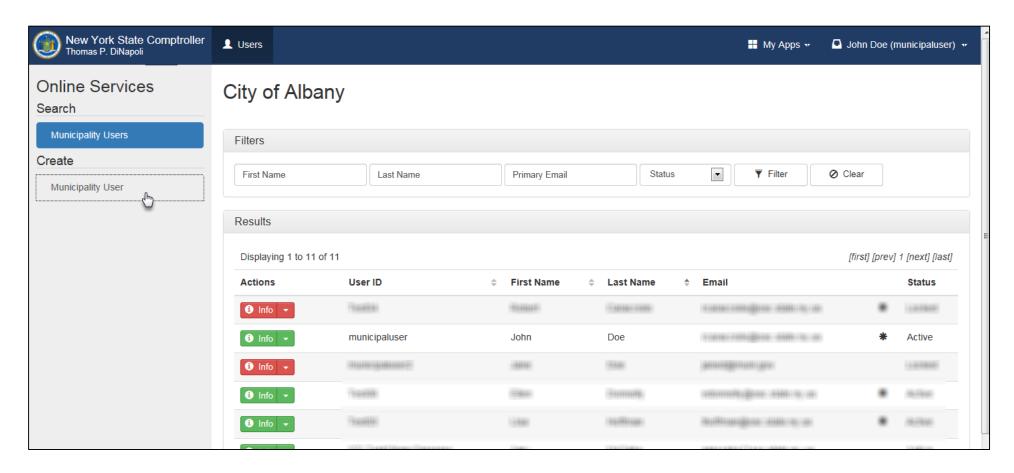


### CREATING ADDITIONAL USER ACCOUNTS (PRIMARY AUTHORIZER ONLY)

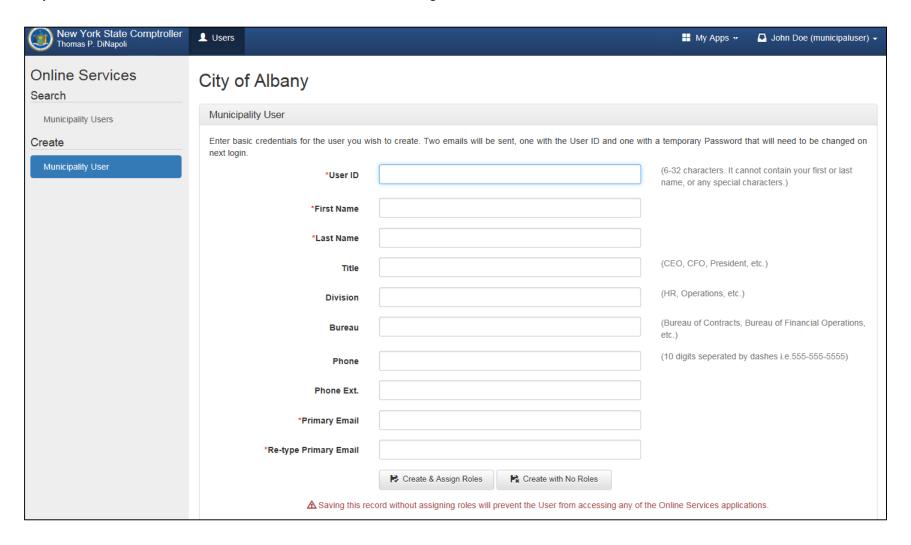
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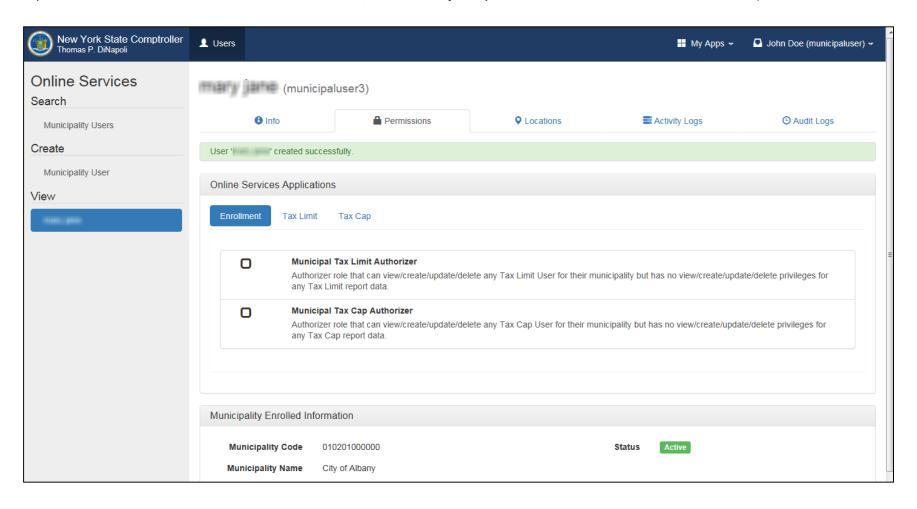
Step 2: Select "Municipality User" underneath Create on the left-hand side.



Step 3: Fill in the new user's information and select "Create and Assign Roles" at the bottom.



**Step 4:** You will now be redirected to Online Services Applications where you can assign roles to the new user account. (*Note: assigning the role of Municipal Tax Cap and/or Tax Limit Authorizer will allow the user to add/remove roles for any user account and create additional accounts)* 



**Step 5:** Once you are done assigning roles, the new user will receive two emails. One email will contain a username and the other a temporary password. (*Note: a non-Primary Authorizer account will only be able to access LGSA applications that they have roles assigned to*)

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Please do not "Reply" direction and indicated message.

For contact information, click http://www.osc.state.ny.us/portal/contact.htm