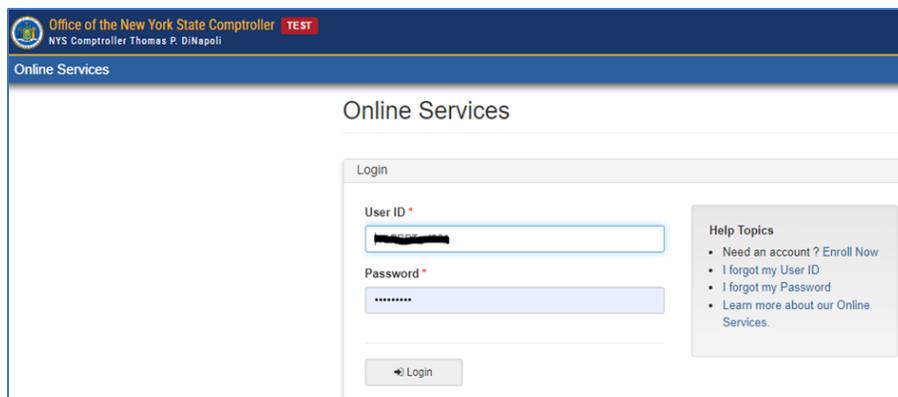


BACKGROUND/CONTEXT

This document provides instructions for verifying a contact in OSC's Online Services Contact Management System. For additional information about the Contact Management process, see the 2024 Office of Operations' Fall Conference [video on this topic](#). Additional information can also be found in the [Guide to Financial Operations](#), as well as on the [Contact Update for State Agencies](#) page.

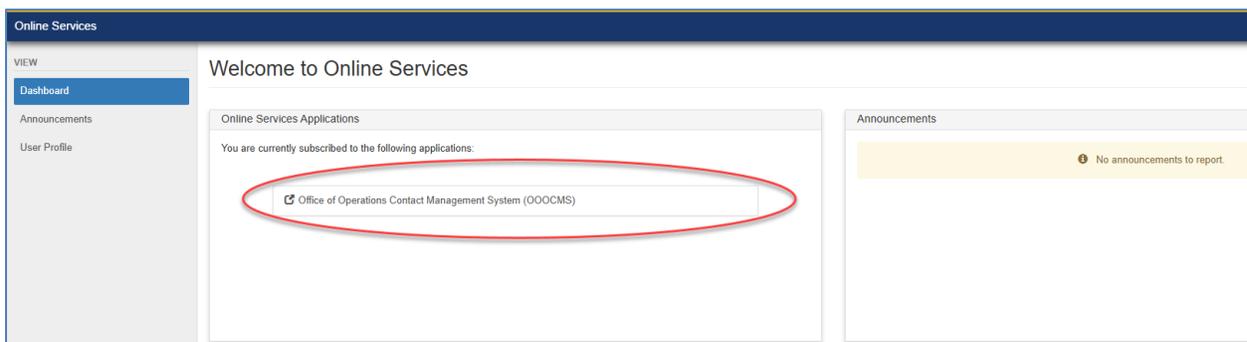
PROCEDURE

- 1.) Log in to <https://onlineservices.osc.state.ny.us/> and enter your credentials. If you forgot your credentials, click I forgot my User ID and/or I forgot my Password to recover your credentials.



The screenshot shows the 'Online Services' login page. At the top, it says 'Office of the New York State Comptroller TEST' and 'NYS Comptroller Thomas P. DiNapoli'. Below that is the 'Online Services' header. The main content area is titled 'Online Services' and contains a 'Login' form. The form has two input fields: 'User ID *' and 'Password *'. Below the password field is a 'Login' button. To the right of the form is a 'Help Topics' box with links: 'Need an account? Enroll Now', 'I forgot my User ID', 'I forgot my Password', and 'Learn more about our Online Services'.

- 2.) From the Dashboard, click Office of Operations Contact Management System (OOOCMS).



The screenshot shows the 'Online Services' dashboard. On the left is a navigation menu with 'Dashboard' selected. The main content area is titled 'Welcome to Online Services'. Below the title is a section 'Online Services Applications' with the text 'You are currently subscribed to the following applications:'. A table lists the applications, with 'Office of Operations Contact Management System (OOOCMS)' circled in red. To the right is an 'Announcements' section with the text 'No announcements to report.'

- 3.) Under Contacts in the left side menu, click Contact Search. The search can be narrowed down by typing any combination of the contact's first and last name, email, title, organizational role, publication, status, department ID, and agency code in the Filtered Search Section.

Filtered Search

Last Name: First Name: Email: Title:

Organizational Role: Publication: Status:

Department Id: Agency Code:

<input type="checkbox"/>	Agencies	First Name	Last Name	Email	Organizational Roles	Status	Record Verified
<input type="checkbox"/>	<input type="button" value="View"/> 78788 - Payroll Salary	Matthew	Adams	madams@zzz01.ny.gov	Payroll Officer Payroll Executive Management Payroll Benefits - Salary Calculations	Active	11/01/2024 09:21:49 AM
<input type="checkbox"/>	<input type="button" value="View"/> 78784 - Payroll Log	Deonte	Banks	dbanks@zzz01.ny.gov	State Agency - Fleet Officer State Agency - Head of Agency	Active	10/30/2024 03:15:07 PM
<input type="checkbox"/>	<input type="button" value="View"/> 78788 - Payroll Hourly	Daniel	Bellinger	dbellinger@zzz01.ny.gov	State Agency - Fleet Card Administrator State Agency - Internal Auditor	Active	10/30/2024 03:14:37 PM
<input type="checkbox"/>	<input type="button" value="View"/> 78788 - Payroll Salary	Joseph	Davis	jsmith@zzz01.ny.gov	Payroll Officer	Active	11/08/2024 03:06:27 PM
<input type="checkbox"/>	<input type="button" value="View"/> 78788 - Payroll Log <input type="button" value="View"/> 78788 - Payroll Hourly	Sabrina	Ionescu	slonescu@zzz01.ny.gov	Payroll IT Coordinator Payroll Check Accounts Liaison Payroll Online (NYSFO) Coordinator	Active	10/30/2024 03:18:07 PM
<input type="checkbox"/>	<input type="button" value="View"/> 78788 - Payroll Salary	Jeffrey	Sterman	jsterman@zzz01.ny.gov	State Agency - Audit Liaison State Agency - Internal Auditor	Active	10/31/2024 11:15:56 AM
<input type="checkbox"/>	<input type="button" value="View"/> 78788 - Payroll Salary	Kayla	Thornton	kthornton@zzz01.ny.gov	State Agency - Internal Auditor State Agency - Internal Control Officer	Active	10/30/2024 03:22:41 PM
<input type="checkbox"/>	<input type="button" value="View"/> 78788 - Payroll Log <input type="button" value="View"/> 78788 - Payroll Salary	Courtney	Vandersloot	cvandersloot@zzz01.ny.gov	Payroll Agency Security Coordinator Payroll Online (NYSFO) Coordinator Payroll Executive Management	Active	10/30/2024 03:19:55 PM

- 4.) Verify the following conditions:
- All employees are still with the organization. Any employee who has left the organization will need to be inactivated, either by clicking the checkbox in the left-hand column and clicking the inactivate button at the bottom of the page, or clicking View to go to their Contact View page and clicking the inactivate button at the bottom. Any new employee will need to be added to the system, which can be done by clicking New Contact on the left-hand side and following the instructions.
 - All Organizational Roles are up to date. If one or more of the roles an employee has is different than what is listed, go to their Contact View page and click Manage Roles to make the changes.
 - The agency information is the same. If this has changed, go to their Contact View page and click Manage Codes to make the changes.
 - The employee's name, email information, title, and phone number are still accurate. Go to the Contact View page and click the Edit button to make these changes, if necessary.
 - The address is the same. If any addresses need to be added or updated, click the Edit button under the Address Information tab.
 - Publications is an optional category, but if the employee wants to receive or stop receiving reports or other types of publications from OSC, the applicable change can be made in Contact View by clicking Manage Publications.

5.) When all of the information is accurate, verify the employee. Employees can be verified in the system either by clicking the checkbox in the left-hand column and clicking the Verify button at the bottom of the page, or by clicking View to go to their Contact View page and clicking the Verify button at the bottom.

BUSINESS UNIT
Demo Business Unit 1
(ZZZ01)

CONTACTS
Contact Search
New Contact

Filtered Search

Last Name First Name Email Title

Organizational Role Publication Status

Department Id Agency Code

Clear Filter(s) New Contact

<input type="checkbox"/>	Agencies	First Name	Last Name	Email	Organizational Roles	Status	Record Verified
<input checked="" type="checkbox"/>	78789 - Payroll Salary	Matthew	Adams	madams@zzz01.ny.gov	Payroll Officer Payroll Executive Management Payroll Earnings - Salary Calculations	Active	11/01/2024 09:21:49 AM
<input type="checkbox"/>	78784 - Payroll Lag 78785 - Payroll Lag	Deonte	Banks	dbanks@zzz01.ny.gov	State Agency - Fiscal Officer State Agency - Head of Agency	Active	10/30/2024 03:15:07 PM
<input type="checkbox"/>	78785 - Payroll Hourly	Daniel	Bellinger	dbellinger@zzz01.ny.gov	State Agency - Fleet Card Administrator State Agency - Internal Auditor	Active	10/30/2024 03:14:37 PM
<input type="checkbox"/>	78789 - Payroll Salary	Joseph	Davis	jsmith@zzz01.ny.gov	Payroll Officer	Active	11/08/2024 03:06:27 PM
<input type="checkbox"/>	78785 - Payroll Lag 78787 - Payroll Hourly	Sabrina	Ionescu	sionescu@zzz01.ny.gov	Payroll IT Coordinator Payroll Chart of Accounts Liaison Payroll Online (NYSPD) Coordinator	Active	10/30/2024 03:18:07 PM
<input type="checkbox"/>	78789 - Payroll Salary	Jeffrey	Sterman	jsberman@zzz01.ny.gov	State Agency - Audit Liaison State Agency - Internal Auditor	Active	10/31/2024 11:15:56 AM
<input type="checkbox"/>	78788 - Payroll Salary	Kayla	Thornton	kthornton@zzz01.ny.gov	State Agency - Internal Auditor State Agency - Internal Control Officer	Active	10/30/2024 03:22:41 PM
<input type="checkbox"/>	78785 - Payroll Lag 78788 - Payroll Salary	Courtney	Vandersloot	cvandersloot@zzz01.ny.gov	Payroll Agency Security Coordinator Payroll Online (NYSPD) Coordinator Payroll Executive Management	Active	10/30/2024 03:19:55 PM

Inactivate Verify

Export to CSV

BUSINESS UNIT
Demo Business Unit 1
(ZZZ01)

CONTACTS
Contact Search
New Contact
MATTHEW ADAMS
Contact View

Contact View
Matthew Adams

Information Address Information

Record

First Name Middle Initial Last Name Suffix Title Work Phone Cell Phone Fax Email Status Created Date Last Modified Date Record Verified Id

ZZZ01 - Demo Business Unit 1
Agency Department
78789 - Payroll Salary 8989898 - Albany Office
Manage Codes
Organizational Roles
Payroll Officer
Payroll Executive Management
Payroll Earnings - Salary Calculations
Manage Roles
Publications
Payroll Bulletins - All Agencies
Payroll Users Group (PUG)
Manage Publications

Edit Verify Inactivate