New York State Comptroller
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Online Services

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

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 enrollment process, you will be authorized to use our Online Services.

You will receive a separate email communication explaining how to establish your password and complete the enrollment process.

If you have any problems or questions, please contact the person in your organization who created your account, if applicable, or contact OSC by clicking http://www.osc.state.ny.us/portal/contact.htm or detailed contact information.

Please do not "Reply" directly to this automatically generated message.
For contact information, click http://www.osc.state.ny.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 Online Services please login with your User ID and Password and you will be asked to change your Password at the following secure website:

https://portal.osc.state.ny.us/enrollment/login

If you have any problems or questions, please contact us by clicking http://www.osc.state.ny.us/portal/contact.htm for detailed contact information.

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ACTIVATING A PRIMARY AUTHORIZER ACCOUNT (Continued)

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

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT (Continued)

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

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT (Continued)

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."

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT (Continued)

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)*

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT (Continued)

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

ASSIGNING 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)*

ASSIGNING ROLES TO AN ACCOUNT (Continued)

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

ASSIGNING ROLES TO AN ACCOUNT (Continued)

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. Jump to Step 9 for instructions on how to assign Assessment Roll Verification roles.**
(Note: the roles for Tax Cap Compliance are under the Tax Cap application)

ASSIGNING ROLES TO AN ACCOUNT – PROPERTY TAX CAP (Continued)

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.

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.

Property Tax Cap

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.

ASSIGNING ROLES TO AN ACCOUNT – PROPERTY TAX CAP (Continued)

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)

ASSIGNING ROLES TO AN ACCOUNT – CONSTITUTIONAL TAX LIMIT (Continued)

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

ASSIGNING ROLES TO AN ACCOUNT – CONSTITUTIONAL TAX LIMIT (Continued)

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.

ASSIGNING ROLES TO AN ACCOUNT – CONSTITUTIONAL TAX LIMIT (Continued)

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)*

ASSIGNING ROLES TO AN ACCOUNT – ASSESSMENT ROLL VERIFICATION (Continued)

Step 9: To assign roles, select "Assessment Roll Verification" underneath Online Services Applications. (Note: only school districts are required to file the Assessment Roll Verification)

ASSIGNING ROLES TO AN ACCOUNT – ASSESSMENT ROLL VERIFICATION (Continued)
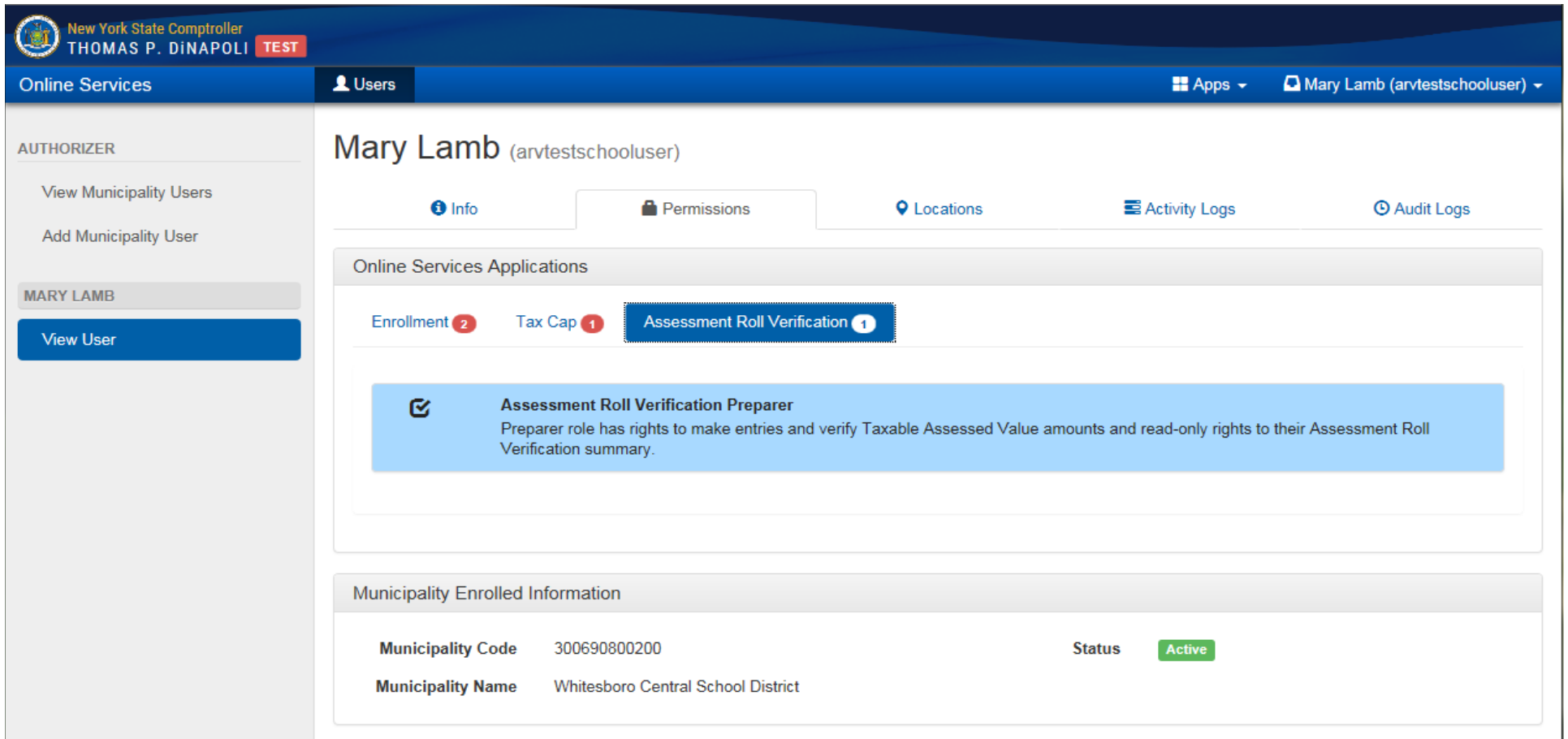
Step 10: You now have the ability to assign the role of Assessment Roll Verification Preparer. Below is a description of the role.

Assessment Roll Verification

Assessment Roll Verification Preparer: Can make entries, verify Taxable Assessed Values and view the Assessment Roll Verification Summary.

ASSIGNING ROLES TO AN ACCOUNT - ASSESSMENT ROLL VERIFICATION (Continued)

Step 11: Once you assign an Assessment Roll Verification 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)

ASSIGNING ROLES TO AN ACCOUNT (Continued)

Step 12: You can now select the "Local Government Real Property Tax Cap Filing System", "Local Government Constitutional Tax Limit Filing System" and/or the "Local Government Assessment Roll Verification" by selecting, "Apps" at the top. *(Note: the Tax Cap Compliance application is located within the Local Government Real Property Tax Cap Filing System)*

CREATING ADDITIONAL USER ACCOUNTS (PRIMARY AUTHORIZER ONLY)

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

CREATING ADDITIONAL USER ACCOUNTS (Continued)

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

CREATING ADDITIONAL USER ACCOUNTS (Continued)

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

CREATING ADDITIONAL USER ACCOUNTS (Continued)

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, Tax Limit and/or Assessment Roll Verification Authorizer will allow the user to add/remove roles for any user account and create additional accounts)*

CREATING ADDITIONAL USER ACCOUNTS (Continued)

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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