

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

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 - [Assessment Roll Verification](#)
 - [Constitutional Tax Limit](#)
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 - Annual Financial Reporting Application**
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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.

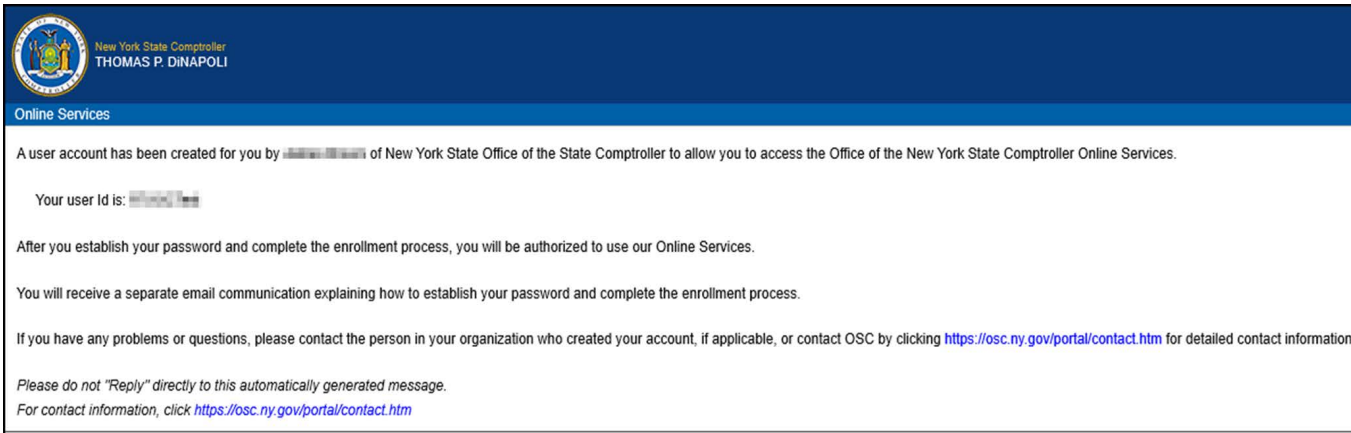
ACTIVATING YOUR ONLINE SERVICES AND PRIMARY AUTHORIZER ACCOUNTS

The Office of the State Comptroller (OSC) has created an account for you to access OSC's "Online Services" portal, from which one can access various reporting systems. This guide shows you how to activate your Primary Authorizer account in Online Services, create additional User accounts, and access the various financial reporting functions once you are logged in to Online Services.

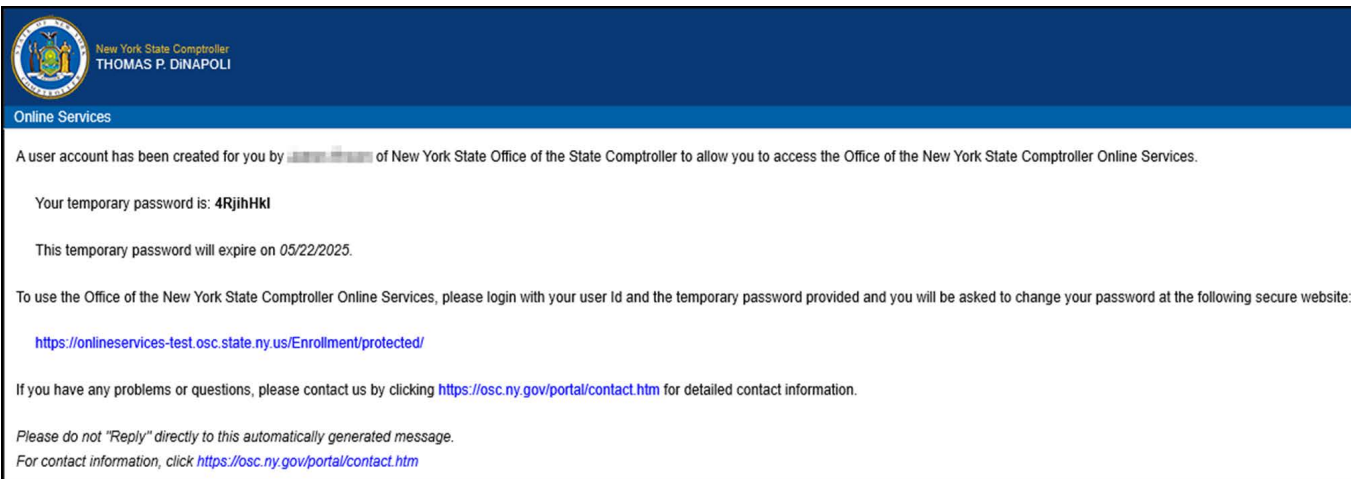
The steps below will walk you through activating your Online Services accounts. The remainder of the document shows you how to perform your functions as a primary authorizer in Online Services.

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT

Step 1: Once your account has been created, you must activate it before you can access any Online Services applications. You will receive two automated emails from Online Services Identity and Access Management (IAM). One email will contain your username and the other a temporary password. This password is valid for one year. If you need assistance with a password reset, you will need to contact the Local Government Help Desk at 866-321-8503 Option 1.



The screenshot shows an email header with the New York State Comptroller's logo and the name THOMAS P. DINAPOLI. The subject is "Online Services". The body text states: "A user account has been created for you by [redacted] of New York State Office of the State Comptroller to allow you to access the Office of the New York State Comptroller Online Services. Your user Id is: [redacted]. 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 <https://osc.ny.gov/portal/contact.htm> for detailed contact information. Please do not 'Reply' directly to this automatically generated message. For contact information, click <https://osc.ny.gov/portal/contact.htm>



The screenshot shows an email header with the New York State Comptroller's logo and the name THOMAS P. DINAPOLI. The subject is "Online Services". The body text states: "A user account has been created for you by [redacted] of New York State Office of the State Comptroller to allow you to access the Office of the New York State Comptroller Online Services. Your temporary password is: 4RjihHKI. This temporary password will expire on 05/22/2025. To use the Office of the New York State Comptroller Online Services, please login with your user Id and the temporary password provided and you will be asked to change your password at the following secure website: <https://onlineservices-test.osc.state.ny.us/Enrollment/protected/>. If you have any problems or questions, please contact us by clicking <https://osc.ny.gov/portal/contact.htm> for detailed contact information. Please do not 'Reply' directly to this automatically generated message. For contact information, click <https://osc.ny.gov/portal/contact.htm>

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT

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



The screenshot shows the 'Online Services' login page. At the top, there is a blue header with the Office of the New York State Comptroller logo and the name 'NYS Comptroller Thomas P. DiNapoli'. Below this is a dark blue bar with the text 'Online Services'. The main content area has a large heading 'Online Services' and a 'Login' form. The form includes two input fields: 'User ID *' with the value 'muniuser' and 'Password *' with masked characters. A 'Login' button is located below the password field. To the right of the form is a 'Help Topics' box containing three links: 'Need an account?', 'I forgot my User ID', and 'I forgot my Password'.

Office of the New York State Comptroller
NYS Comptroller Thomas P. DiNapoli

Online Services

Online Services

Login

User ID *
muniuser

Password *
.....

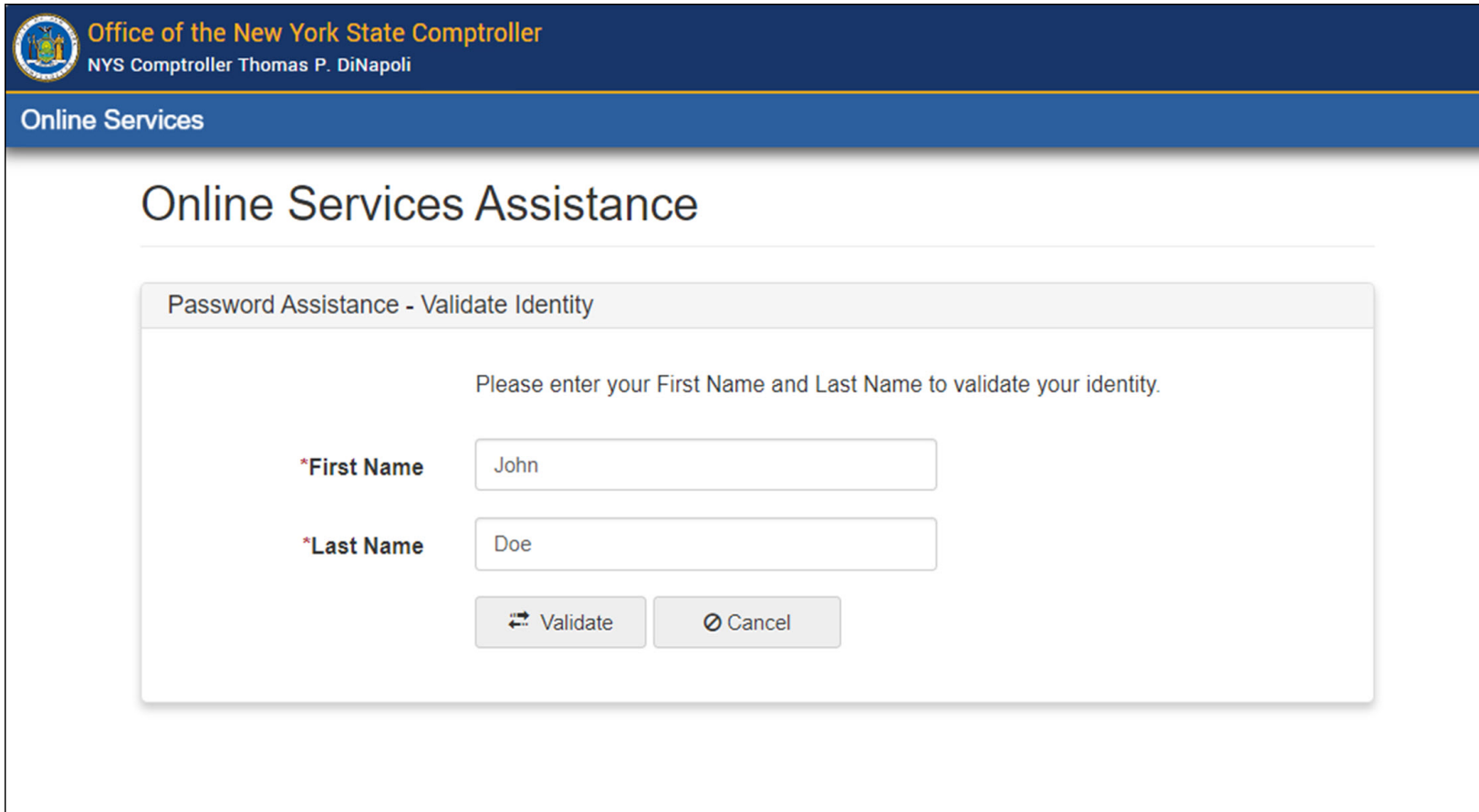
Login

Help Topics

- Need an account ?
[Learn more about our Online Services.](#)
- I forgot my User ID
- I forgot my Password

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT

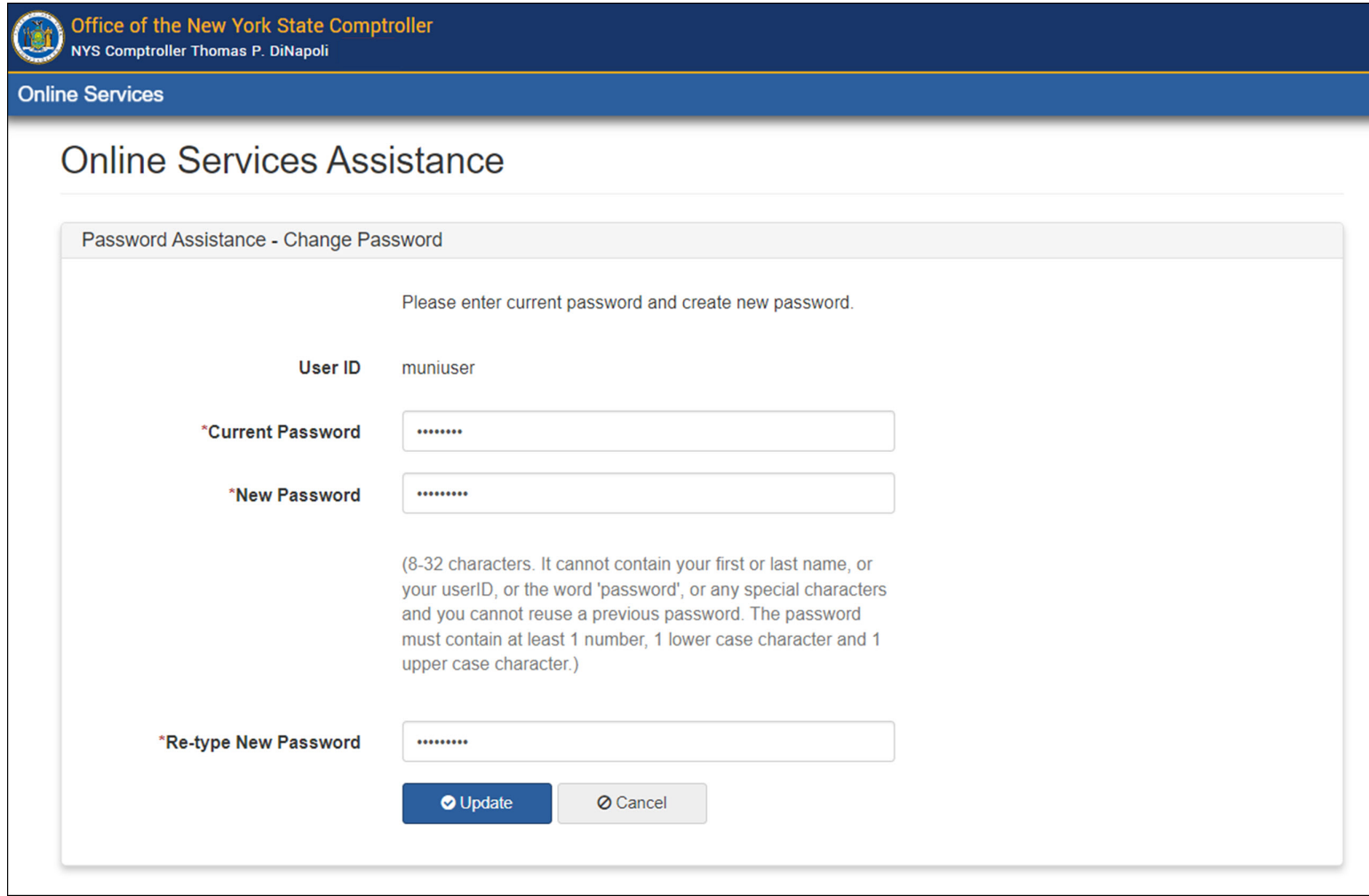
Step 3: On the Identity Validation screen, enter your first and last name. When done, select “Validate.”



The screenshot shows a web interface for the Office of the New York State Comptroller. At the top, there is a dark blue header with the office's logo and name. Below this is a lighter blue bar labeled 'Online Services'. The main content area is titled 'Online Services Assistance' and contains a dialog box titled 'Password Assistance - Validate Identity'. Inside the dialog, there is a prompt: 'Please enter your First Name and Last Name to validate your identity.' Below the prompt are two text input fields. The first field is labeled '*First Name' and contains the text 'John'. The second field is labeled '*Last Name' and contains the text 'Doe'. At the bottom of the dialog are two buttons: 'Validate' (with a double-headed arrow icon) and 'Cancel' (with a circle and slash icon).

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT

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.”



The screenshot shows a web interface for changing a password. At the top, there is a header for the Office of the New York State Comptroller, NYS Comptroller Thomas P. DiNapoli, and a sub-header for Online Services. The main heading is 'Online Services Assistance'. Below this is a form titled 'Password Assistance - Change Password'. The form contains the following elements:

- A message: "Please enter current password and create new password."
- A label 'User ID' with the value 'muniuser'.
- A label '*Current Password' with a text input field containing seven dots.
- A label '*New Password' with a text input field containing seven dots.
- A detailed password requirement note: "(8-32 characters. It cannot contain your first or last name, or your userID, or the word 'password', or any special characters and you cannot reuse a previous password. The password must contain at least 1 number, 1 lower case character and 1 upper case character.)"
- A label '*Re-type New Password' with a text input field containing seven dots.
- Two buttons at the bottom: a blue 'Update' button and a grey 'Cancel' button.

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT

Step 5: When prompted, choose and answer two secret questions. When done, select “Update.”

These questions will be used in the event you need to recover your password or otherwise validate your identity. The answer you type now will need to exactly match what you enter later.

The screenshot shows a web interface for setting secret questions. At the top left is the logo of the Office of the New York State Comptroller, with the text 'Office of the New York State Comptroller' and 'NYS Comptroller Thomas P. DiNapoli'. Below this is a blue header bar with 'Online Services'. The main content area is titled 'Online Services Assistance' and contains a form titled 'User Profile Assistance - Set Secret Questions & Answers'. The form includes a prompt: 'Please select two different questions and enter answers.' Below this, the 'User ID' is listed as 'muniuser'. There are two question-answer pairs: Question 1 is 'In what city were you born?' with a dropdown arrow, and Answer 1 is a text input field containing 'New York'. Question 2 is 'What was the make of your first automobile?' with a dropdown arrow, and Answer 2 is a text input field containing 'Chevrolet'. At the bottom of the form are two buttons: a blue 'Update' button with a checkmark icon and a grey 'Cancel' button with a close icon.

ASSIGNING ROLES TO A CFO ACCOUNT (PRIMARY AUTHORIZER ONLY)

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

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

The screenshot displays the 'Online Services' dashboard for the Office of the New York State Comptroller. The page title is 'Welcome to Online Services'. The left sidebar contains navigation options: 'Dashboard', 'Announcements', and 'User Profile'. The main content area is divided into several sections:

- Online Services Applications:** A message states 'You are currently subscribed to the following applications:' followed by a yellow box indicating 'No applications available.'
- Announcements:** A yellow box indicates 'No announcements to report.'
- Municipality Information:** A table with the following data:

Municipality Name	City of Albany
Municipality Code	0000000000
Number of Users	19
Application(s)	Local Government Tax Data Verification Filing System (LGTDV) , Local Government Constitutional Tax Limit Filing System (LGCTL) , Local Government Real Property Tax Cap Filing System (LGPTC)

Below the table is a button labeled 'Manage Users' with a red arrow pointing to it.
- User Information:** A table with the following data:

Name	John Doe
User ID	muniuser
Previous Last Access	
Password Expiration Date	Jun 04, 2025 08:55 AM
Created On	Jun 04, 2024 08:32 AM

Below the table is a button labeled 'Manage Profile'.

ASSIGNING ROLES TO A CFO ACCOUNT

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

The screenshot displays the 'Users' management page for the City of Albany. The page header includes the Office of the New York State Comptroller logo and the name of the Comptroller, Thomas P. DiNapoli. The user 'John Doe (muniuser)' is logged in. The interface is divided into a left sidebar with 'View Municipality Users' and 'Add Municipality User' buttons, and a main content area. The main content area has a 'Filters' section with input fields for 'First Name', 'Last Name', and 'Primary Email', and a 'Status' dropdown. Below the filters is a 'Results' section showing a table of users. The table has columns for 'Actions', 'User ID', 'First Name', 'Last Name', 'Email', and 'Status'. The user 'muniuser' is highlighted, and a red arrow points to the 'Info' dropdown menu next to it. The dropdown menu is open, showing options: 'Info', 'Permissions', 'Locations', 'Activity Logs', and 'Audit Logs'.

Actions	User ID	First Name	Last Name	Email	Status
Info	...	Robert	Caracole	...	Locked
Info	TDVTestAlbany01	Steve	Comptroller	...	Active
Info	muniuser	John	Doe	...	Active
Info	...	John	Doe	...	Active
Info	...	Ellen	Donnelly	...	Locked
Info	...	Lisa	Huffman	...	Locked
Info	Municipaluser3	Mary	Jane	...	Locked
Info	CTVTestAlbanyPreparer	Amy	McCabe	...	Locked

ASSIGNING ROLES TO A CFO ACCOUNT

Step 3: The Permissions tab will default to the Online Services Identity and Access Management (Enrollment) section where the Authorizer box will be checked for CFO user accounts. To assign roles, select the desired application underneath Online Services Applications.

The role of Authorizer under the Enrollment tab allows the user to add/remove roles for any user account and create additional accounts. These permissions should be restricted to the CFO user account as primary authorizer and should not be assigned to other users.

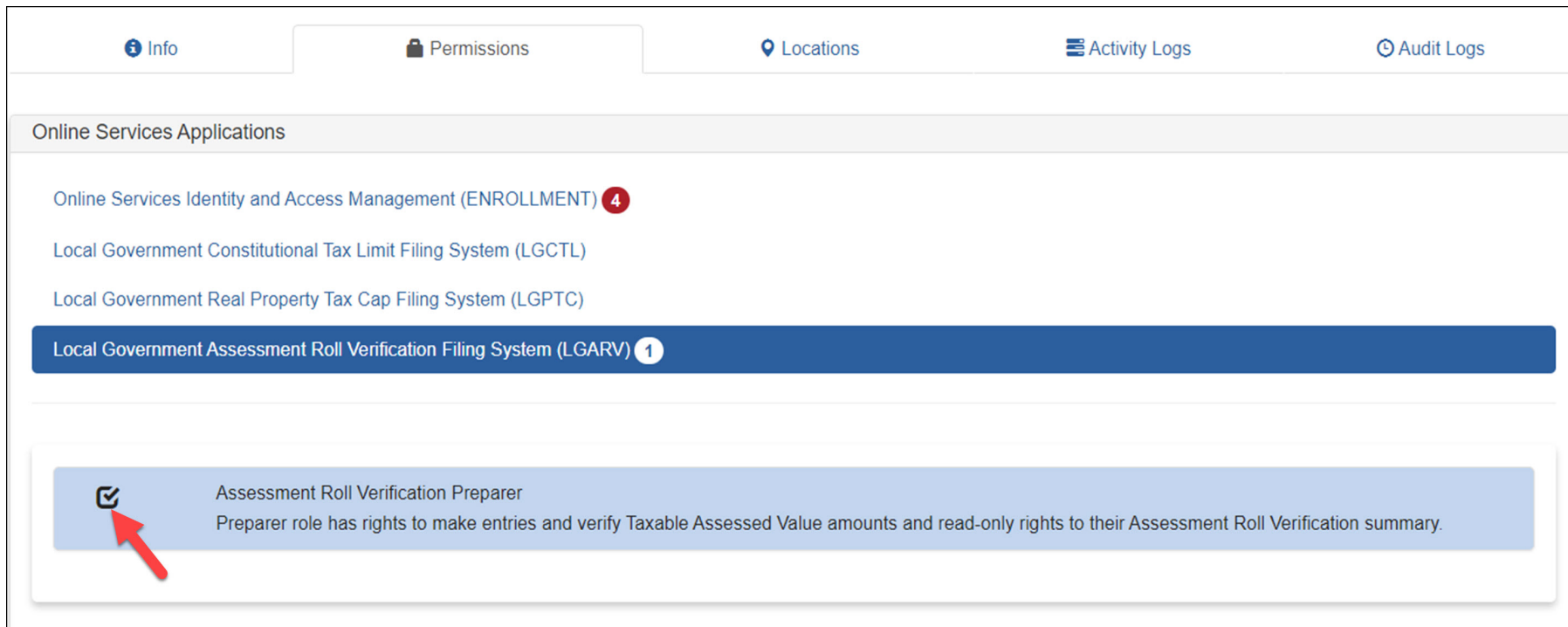
The screenshot displays the 'Permissions' tab in the IAM system. At the top, there are navigation tabs: 'Info', 'Permissions' (selected), 'Locations', 'Activity Logs', and 'Audit Logs'. A green notification bar at the top left states 'User 'John Doe' created successfully.' Below this, the 'Online Services Applications' section is visible, with 'Online Services Identity and Access Management (ENROLLMENT)' selected and highlighted in blue. Underneath, two applications are listed: 'Local Government Constitutional Tax Limit Filing System (LGCTL)' and 'Local Government Real Property Tax Cap Filing System (LGPTC)'. A scrollable list of roles is shown below, each with an unchecked checkbox and a description:

- Municipal Tax Limit Authorizer
Authorizer role that can view/create/update/delete any Tax Limit User for their municipality but has no view/create/update/delete privileges for any Tax Limit report data.
- Municipal Tax Cap Authorizer
Authorizer role that can view/create/update/delete any Tax Cap User for their municipality but has no view/create/update/delete privileges for any Tax Cap report data.
- Assessment Roll Verification Authorizer
Authorizer role that can view/create/update/delete any Assessment Roll Verification User for their municipality but has no read-only/edit/send/approve privileges for any Assessment Roll Verification data.
- Annual Financial Reporting Authorizer
Authorizer role that can manage any Annual Financial Reporting User for their municipality but has no read-only/edit/send/approve privileges for any Annual Financial Reporting data.

ASSIGNING ROLES TO A CFO ACCOUNT – ASSESSMENT ROLL VERIFICATION (School districts)

Step 4 (ARV Only): You now have the ability to assign the role of Assessment Roll Verification Preparer. Once you assign an Assessment Roll Verification role, its corresponding box will be check-marked and the role highlighted in blue. Log out, close the browser window, and then log back in for the changes to take effect.

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



The screenshot displays the 'Permissions' tab of the IAM interface. At the top, there are navigation tabs for 'Info', 'Permissions', 'Locations', 'Activity Logs', and 'Audit Logs'. Below these, a section titled 'Online Services Applications' lists several applications: 'Online Services Identity and Access Management (ENROLLMENT)' with a red '4' notification, 'Local Government Constitutional Tax Limit Filing System (LGCTL)', 'Local Government Real Property Tax Cap Filing System (LGPTC)', and 'Local Government Assessment Roll Verification Filing System (LGARV)' with a white '1' notification. The 'LGARV' application is highlighted with a blue background. Below the applications, a role entry for 'Assessment Roll Verification Preparer' is shown with a checked checkbox and a red arrow pointing to it. The role description reads: 'Preparer role has rights to make entries and verify Taxable Assessed Value amounts and read-only rights to their Assessment Roll Verification summary.'

ASSIGNING ROLES TO A CFO ACCOUNT – CONSTITUTIONAL TAX LIMIT (Counties, Cities and Villages)

Step 4 (CTL only): You now have the ability to assign the roles of Tax Limit Reviewer, Preparer and/or Certifier. Once you assign a Constitutional Tax Limit role, its corresponding box will be check-marked and the role highlighted in blue. Log out, close the browser window, and then log back in for the changes to take effect.

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.

The screenshot shows the 'Permissions' tab in the IAM interface. Under 'Online Services Applications', the 'Local Government Constitutional Tax Limit Filing System (LGCTL)' is selected. Below this, a list of roles is shown with checkboxes:

- Tax Limit Certifier
Certifier role has all of the privileges of the Reviewer role plus the ability to certify Tax Limit report data submissions for their municipality.
- Tax Limit Reviewer
View-Only role with no create/update/delete privileges. This role can view the certified and uncertified Tax Limit data for their municipality only.
- Tax Limit Preparer
Preparer role has view/create/update/delete access to all unsubmitted Tax Limit report data for their municipality only. This role can also view certified data for their municipality.

ASSIGNING ROLES TO A CFO ACCOUNT – PROPERTY TAX CAP

Step 4 (PTC only): You now have the ability to assign the roles of Tax Cap and Tax Cap Compliance Reviewer, Preparer and/or Certifier.

The roles for Tax Cap Compliance are under the Tax Cap application.

Property Tax Cap Roles

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 Compliance Roles

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 A CFO ACCOUNT – PROPERTY TAX CAP (PTC)

Step 4 continued (PTC only): 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. Log out, close the browser window, and then log back in for the changes to take effect.

The screenshot shows the IAM interface with the following elements:

- Navigation tabs: Info, Permissions, Locations, Activity Logs, Audit Logs.
- Section: Online Services Applications.
- Application list:
 - Online Services Identity and Access Management (ENROLLMENT) 4
 - Local Government Constitutional Tax Limit Filing System (LGCTL)
 - Local Government Real Property Tax Cap Filing System (LGPTC) 1** (highlighted in blue)
- Role assignment table for LGPTC:

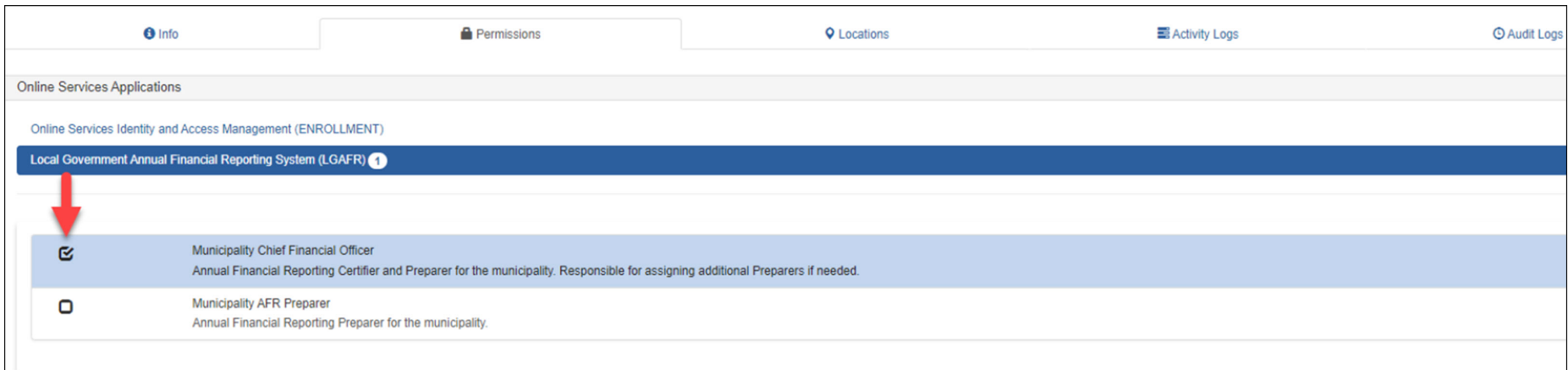
<input checked="" type="checkbox"/>	Tax Cap Certifier All the privileges of the Reviewer role. Can also certify Tax Cap report data submissions for their municipality. All privileges apply only to the user's Municipality.
<input type="checkbox"/>	Tax Cap Reviewer Read privileges for any certified or uncertified Tax Cap data for their municipality. All privileges apply only to the user's Municipality.
<input type="checkbox"/>	Tax Cap Preparer Ability to enter and edit data in unsubmitted Tax Cap forms. Read privileges for certified data for their municipality. All privileges apply only to the user's Municipality.
<input type="checkbox"/>	Tax Cap Compliance Certifier Ability to certify Tax Cap Compliance (Tax Levy) information. Ability to view the read-only Tax Cap Form Summary screen. No Tax levy (Tax Cap Compliance) data entry privileges. All privileges apply only to the user's Municipality.
<input type="checkbox"/>	Tax Cap Compliance Preparer Ability to enter Tax Cap Compliance (Tax Levy) data. Ability to view the read-only Tax Cap Form Summary screen. No Tax Levy (Tax Cap Compliance) certification privileges. All privileges apply only to the user's Municipality.
<input type="checkbox"/>	Tax Cap Compliance Reviewer Read-only rights for the Tax Cap Compliance (Tax Levy) data. Ability to view the read-only Tax Cap Form Summary screen. All privileges apply only to the user's Municipality.

ASSIGNING ROLES TO A CFO ACCOUNT - ANNUAL FINANCIAL REPORT

Step 4 (AFR Only): Check the box to assign the Municipality Chief Financial Officer role. Once assigned, the corresponding box will be check-marked and the role highlighted in blue. Log out, close the browser window, and then log back in for the changes to take effect. If you are not creating any preparer accounts, please refer to the AFR User Manual on OSC's website for the next step to start filing.

Only one role should be selected for each user account.

- **Municipality Chief Financial Officer:** Can read all certified and uncertified filing data, can edit all uncertified filing data, can assign report preparers, can unlock filings awaiting certification, and can certify filings.
- **Municipality AFR Preparer:** Can read all certified and uncertified filing data, can edit all uncertified filing data, and can mark filings as ready for certification.



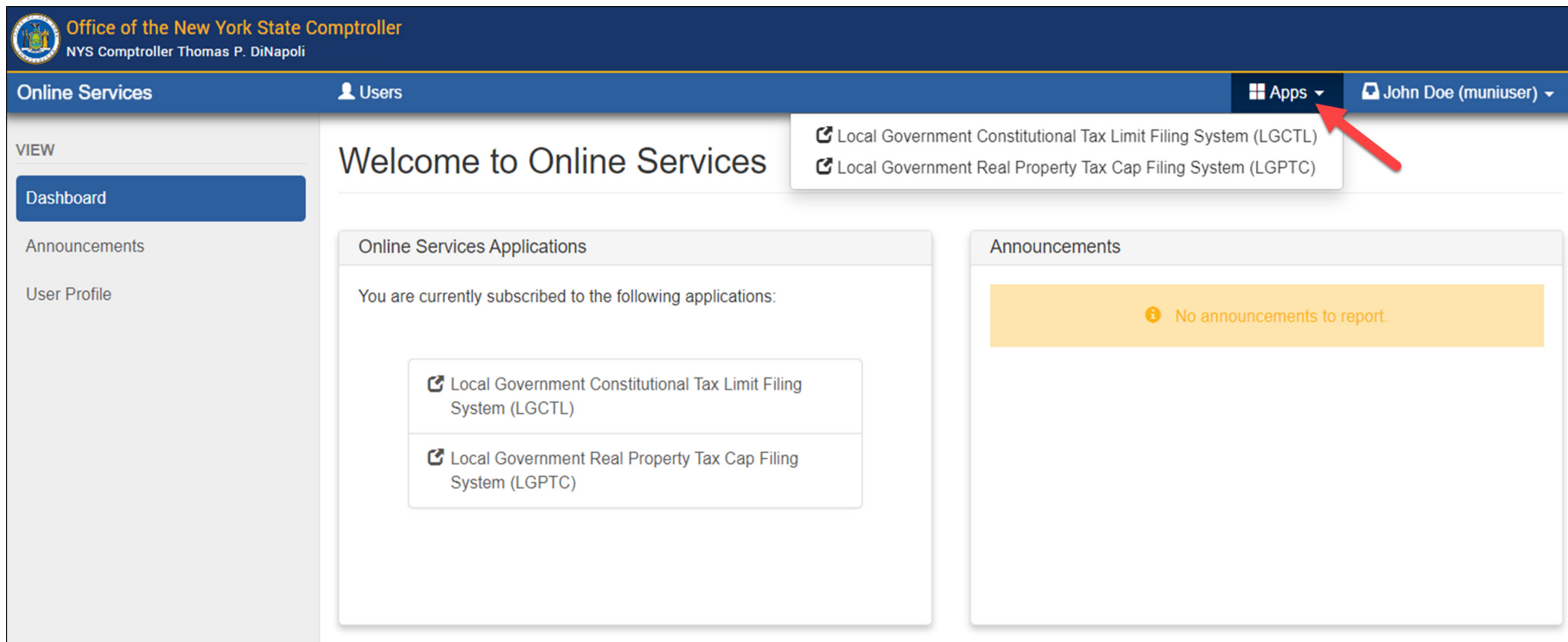
The screenshot displays the 'Local Government Annual Financial Reporting System (LGAFR)' section of the IAM interface. It features a navigation bar with 'Info', 'Permissions', 'Locations', 'Activity Logs', and 'Audit Logs'. Below the navigation bar, the 'Local Government Annual Financial Reporting System (LGAFR)' is highlighted in blue. Underneath, there are two role options:

Role	Description
<input checked="" type="checkbox"/>	Municipality Chief Financial Officer Annual Financial Reporting Certifier and Preparer for the municipality. Responsible for assigning additional Preparers if needed.
<input type="checkbox"/>	Municipality AFR Preparer Annual Financial Reporting Preparer for the municipality.

ASSIGNING ROLES TO A CFO ACCOUNT

Step 5: You can now select the “Local Government Real Property Tax Cap Filing System”, “Local Government Constitutional Tax Limit Filing System,” “Local Government Assessment Roll Verification” or the "Local Government Annual Financial Reporting System" by selecting "Apps" at the top.

Note that the Tax Cap Compliance application is located within the Local Government Real Property Tax Cap Filing System.



The screenshot displays the 'Online Services' dashboard for the Office of the New York State Comptroller, NYS Comptroller Thomas P. DiNapoli. The user is logged in as 'John Doe (muniuser)'. The 'Apps' dropdown menu is open, showing two options: 'Local Government Constitutional Tax Limit Filing System (LGCTL)' and 'Local Government Real Property Tax Cap Filing System (LGPTC)'. A red arrow points to the 'Apps' dropdown menu. The dashboard also shows a 'Welcome to Online Services' message, a list of 'Online Services Applications' (LGCTL and LGPTC), and an 'Announcements' section with a message: 'No announcements to report.'

CREATING ADDITIONAL USER ACCOUNTS (PRIMARY AUTHORIZER ONLY)

Step 1: Once you are logged into the website, select “Manage Users” underneath Municipality Information.
If you do not see this option, then you do not have a Primary Authorizer account.

The screenshot displays the 'Online Services' dashboard for a user. The top navigation bar includes the Office of the New York State Comptroller logo and the text 'Online Services' and 'Users'. A sidebar on the left contains a 'VIEW' menu with options for 'Dashboard', 'Announcements', and 'User Profile'. The main content area is titled 'Welcome to Online Services' and is divided into several sections:

- Online Services Applications:** A box stating 'You are currently subscribed to the following applications:' containing two items: 'Local Government Constitutional Tax Limit Filing System (LGCTL)' and 'Local Government Real Property Tax Cap Filing System (LGPTC)'.
- Announcements:** A yellow box with the message 'No announcements to report.'
- Municipality Information:** A section with the following details:
 - Municipality Name:** City of Albany
 - Municipality Code:** 100000000
 - Number of Users:** 19
 - Application(s):** Local Government Tax Data Verification Filing System (LGTDV), Local Government Constitutional Tax Limit Filing System (LGCTL), Local Government Real Property Tax Cap Filing System (LGPTC)A 'Manage Users' button with a right-pointing arrow is located at the bottom of this section, highlighted with a red arrow.
- User Information:** A section with the following details:
 - Name:** John Doe
 - User ID:** muniuser
 - Previous Last Access:** Jun 04, 2024 10:36 AM
 - Password Expiration Date:** Jun 04, 2025 08:55 AM
 - Created On:** Jun 04, 2024 08:32 AMA 'Manage Profile' button with a right-pointing arrow is located at the bottom of this section.

CREATING ADDITIONAL USER ACCOUNTS

Step 2: Select “Add Municipality User” on the left-hand side.

The screenshot shows the 'Users' management interface for the City of Albany. On the left-hand side, under the 'AUTHORIZER' section, there are two buttons: 'View Municipality Users' and 'Add Municipality User'. A red arrow points to the 'Add Municipality User' button. The main content area displays a list of users with columns for 'Actions', 'User ID', 'First Name', 'Last Name', and 'Email'. The list shows 7 users, with the first one being Robert Casarola. The interface also includes a search bar at the top and a filter section with input fields for 'First Name', 'Last Name', 'Primary Email', and 'Status', along with 'Filter' and 'Reset' buttons.

Office of the New York State Comptroller
NYS Comptroller Thomas P. DiNapoli

Online Services **Users**

AUTHORIZER

View Municipality Users

Add Municipality User

City of Albany

Filters

First Name Last Name Primary Email Status Filter Reset

Results

Displaying 1 to 15 of 19

Actions	User ID	First Name	Last Name	Email
Info	...	Robert	Casarola	rcasarola@city.albany.ny.us
Info	...	Rob	Comptroller	lcomptroller@city.albany.ny.us
Info	...	John	Die	john@city.albany.ny.us
Info	...	John	Die	john@city.albany.ny.us
Info	...	John	Die	john@city.albany.ny.us
Info	...	John	Die	john@city.albany.ny.us
Info	...	John	Die	john@city.albany.ny.us

CREATING ADDITIONAL USER ACCOUNTS

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

Add Municipality User

User ID *

(6-32 characters. It cannot contain your first or last name, or any special characters.)

First Name * **Last Name ***

Title **Division** **Bureau**

(CEO, CFO, President, etc.) (HR, Operations, etc.) (Bureau of Contracts, Bureau of Financial Operations, etc.)

Phone **Phone Ext.**

(10 digits seperated by dashes i.e.555-555-5555)

Primary Email *

Re-type Primary Email *

! Two emails will be sent, one with the User ID and one with a temporary Password that will need to be changed on next login.

! Saving this record without assigning roles will prevent the User from accessing any of the Online Services applications.

CREATING ADDITIONAL USER ACCOUNTS

Step 4: You will now be redirected to Online Services Applications where you can assign roles to the new user account. The Permissions tab will default to the Enrollment section. When creating accounts for users other than the CFO, no boxes should be checked in the Enrollment Section. To assign roles for other users, select the desired application underneath Online Services Applications.

The role of Authorizer under the Enrollment tab allows the user to add/remove roles for any user account and create additional accounts. These permissions should be restricted to the CFO user account as primary authorizer and should not be assigned to other users.

The screenshot displays the 'Permissions' tab in the IAM system. At the top, there is a navigation bar with 'Info', 'Permissions', 'Locations', 'Activity Logs', and 'Audit Logs'. Below this, a green notification bar states 'User 'John Doe' created successfully.' The main content area is titled 'Online Services Applications' and contains a list of applications: 'Online Services Identity and Access Management (ENROLLMENT)', 'Local Government Constitutional Tax Limit Filing System (LGCTL)', and 'Local Government Real Property Tax Cap Filing System (LGPTC)'. Below these applications, there is a list of roles, each with an unchecked checkbox and a description:

- Municipal Tax Limit Authorizer
Authorizer role that can view/create/update/delete any Tax Limit User for their municipality but has no view/create/update/delete privileges for any Tax Limit report data.
- Municipal Tax Cap Authorizer
Authorizer role that can view/create/update/delete any Tax Cap User for their municipality but has no view/create/update/delete privileges for any Tax Cap report data.
- Assessment Roll Verification Authorizer
Authorizer role that can view/create/update/delete any Assessment Roll Verification User for their municipality but has no read-only/edit/send/approve privileges for any Assessment Roll Verification data.
- Annual Financial Reporting Authorizer
Authorizer role that can manage any Annual Financial Reporting User for their municipality but has no read-only/edit/send/approve privileges for any Annual Financial Reporting data.

CREATING ADDITIONAL USER ACCOUNTS

Step 5 (Property Tax Applications only): See the description of the various user roles linked below to assign the appropriate permissions to a user account. Check the box to assign the desired role. Once assigned, the corresponding box will be check-marked and the role highlighted in blue. Log out, close the browser window, and then log back in for the changes to take effect.

[Assessment Roll Verification Roles](#)
[Constitutional Tax Limit Roles](#)
[Tax Cap/Tax Cap Compliance Roles](#)

CREATING ADDITIONAL USER ACCOUNTS

Step 5 (AFR Preparer Accounts only): Check the box to assign the Municipality AFR Preparer role. Once assigned, the corresponding box will be check-marked and the role highlighted in blue. Log out, close the browser window, and then log back in for the changes to take effect.

Only one role should be selected for each user account.


The screenshot displays the 'Online Services Applications' section of the IAM interface. The 'Local Government Annual Financial Reporting System (LGAFR)' application is selected and highlighted in blue. Below the application name, two roles are listed:

- Municipality Chief Financial Officer
Annual Financial Reporting Certifier and Preparer for the municipality. Responsible for assigning additional Preparers if needed.
- Municipality AFR Preparer
Annual Financial Reporting Preparer for the municipality.

A red arrow points to the checked checkbox for the 'Municipality AFR Preparer' role.

CREATING ADDITIONAL USER ACCOUNTS

Step 6: 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. *A non-Primary Authorizer account will only be able to access LGSA applications which they have been assigned a role.*



Online Services

A user account has been created for you by [redacted] to allow you to access the Office of the New York State Comptroller Online Services.


Your user Id is: AdditionalMuniUser

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 <https://osc.ny.gov/portal/contact.htm> for detailed contact information.

*Please do not "Reply" directly to this automatically generated message.
For contact information, click <https://osc.ny.gov/portal/contact.htm>*



Online Services

A user account has been created for you by [redacted] to allow you to access the Office of the New York State Comptroller Online Services.

Your temporary password is: [redacted]

This temporary password will expire on 06/04/2025.

To use the Office of the New York State Comptroller Online Services, please login with your user Id and the temporary password provided and you will be asked to change your password at the following secure website:

<https://onlineservices-test.osc.state.ny.us/Enrollment/protected/>

If you have any problems or questions, please contact us by clicking <https://osc.ny.gov/portal/contact.htm> for detailed contact information.

*Please do not "Reply" directly to this automatically generated message.
For contact information, click <https://osc.ny.gov/portal/contact.htm>*

CREATING ADDITIONAL USER ACCOUNTS

Step 7 (AFR Preparer Accounts only): For preparers to complete a filing, there are additional steps the CFO must take in the AFR application. Select the Start Filing button located in the Workflow section of the screen. This will create a start date for the report and open the financial statements and schedules for editing.

Only a CFO who has enrolled in Online Services and has the “Municipality Chief Financial Officer” role for the AFR application will be able to select Start Filing.

The screenshot displays the 'Annual Financial Report' interface for the New York State Comptroller, Thomas P. DiNapoli. The page is titled '01/01/2023 - 12/31/2023 Filing Summary'. The left sidebar shows 'Example TOWN' with 'Code: FYE: 12/31' and 'Filing Period: 01/01/2023 - 12/31/2023'. The status is 'Available'. The main content area is divided into 'Filing Information' and 'Workflow'. The 'Filing Information' section shows 'Due Date: This filing is due on 03/01/2024' and 'Status: Available'. It also lists 'Chief Financial Officer' and 'Preparer(s)' with warning icons indicating no assignments. The 'Workflow' section has an 'Available Actions' box with the text: 'Initialize the required financial statements and schedules for the specified fiscal period. Grants assigned preparer(s) the ability to modify the filing.' A blue 'Start Filing' button is located within this box, and a red arrow points to it from the left.

CREATING PREPARER USER ACCOUNTS

Step 8 (AFR Preparer Accounts Only): Select the Edit button located in the Filing Information section of the screen to open the Edit Filing Information window.

01/01/2023 - 12/31/2023
Filing Summary

Filing Information [Edit](#)

Due Date
This filing is due on 03/01/2024.

Status
In Progress

Chief Financial Officer
[Redacted]

Preparer(s)
⚠ No preparers have been assigned to this filing.

Workflow

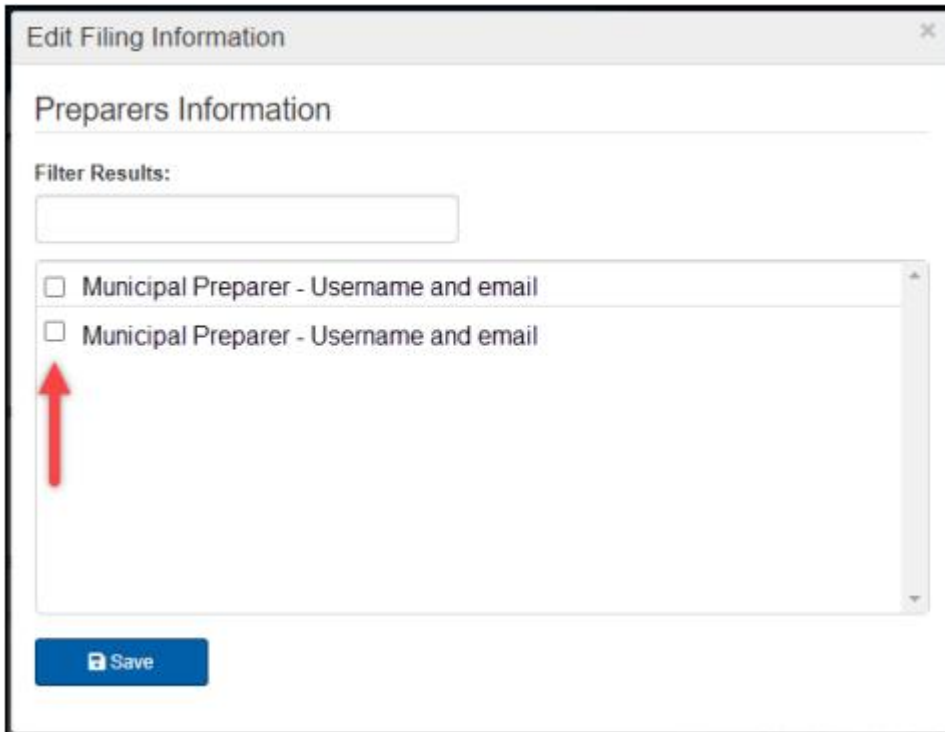
Available Actions
Return the filing to the *Available* status and reset data for Financial Statements, Schedules, Associated Tasks, Filing Preparer(s) and Filing History.
(This action is permanent and cannot be undone.)
[Reset Filing](#)

Tasks

Section	Last Modified
<input type="checkbox"/> Complete A - General Fund Financial Statements	
<input type="checkbox"/> Complete Financial Statements Validation Financial Statements	
<input type="checkbox"/> Complete Statement of Indebtedness Schedules	
<input type="checkbox"/> Complete Bond Repayment Schedules	
<input type="checkbox"/> Complete Bank Reconciliation Schedules	
<input type="checkbox"/> Complete Employee and Retiree Benefits Schedules	

CREATING PREPARER USER ACCOUNTS

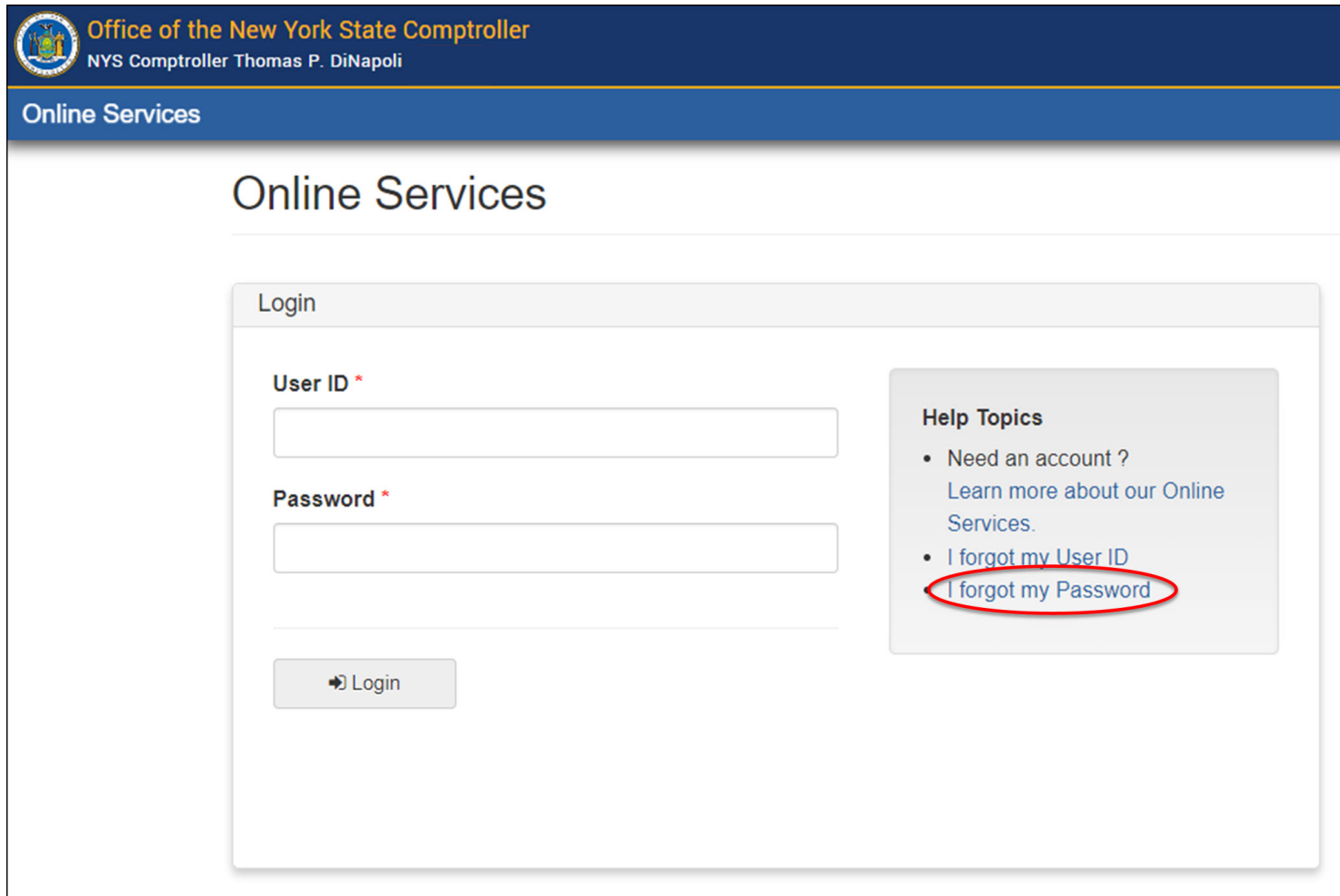
Step 9 (AFR Preparer Accounts Only): Check the user whom you would like to grant access to prepare the report and click *Save*. *The Preparer must have completed their enrollment set-up in order to be available in AFR.*



The screenshot shows a web application window titled "Edit Filing Information". Inside, there is a section for "Preparers Information". Below this section is a "Filter Results:" label followed by an empty text input field. A scrollable list contains two entries, each with an unchecked checkbox and the text "Municipal Preparer - Username and email". A red arrow points to the checkbox of the first entry. At the bottom left of the window is a blue "Save" button with a floppy disk icon.

PASSWORD RECOVERY

Step 1: Select "I forgot my Password".



The screenshot shows the 'Online Services' login interface. At the top left is the logo for the Office of the New York State Comptroller, NYS Comptroller Thomas P. DiNapoli. Below this is a blue header with the text 'Online Services'. The main content area is titled 'Online Services' and contains a 'Login' form. The form has two input fields: 'User ID *' and 'Password *', followed by a 'Login' button with a right-pointing arrow. To the right of the form is a 'Help Topics' box containing two links: 'Need an account ? Learn more about our Online Services.' and 'I forgot my User ID'. The link 'I forgot my Password' is circled in red.

Office of the New York State Comptroller
NYS Comptroller Thomas P. DiNapoli

Online Services

Online Services

Login

User ID *

Password *

Login

Help Topics

- Need an account ?
[Learn more about our Online Services.](#)
- I forgot my User ID
- [I forgot my Password](#)

PASSWORD RECOVERY

Step 2: Enter your user ID, first name and last name. Select “Next”.

Recover Password

Password Assistance - Identity Validation

Please enter the data exactly as you enrolled.

*User ID

*First Name

*Last Name

< Previous Next > Cancel Finish

Step 3: Enter the responses to the security questions you chose when setting up your account. Select “Next”.

Recover Password

Password Assistance - Secret Questions/Answers Validation

Please answer the following questions. If they are NOT your questions, please contact us.

*Which phone number do you remember most from your childhood?

*In what city were you born?

< Previous Next > Cancel Finish

PASSWORD RECOVERY

Step 4: Enter your new password twice. Select “Next”.

Recover Password

Password Assistance - Password Creation

Please enter your desired new password. The new password should:

- contain 8 to 32 characters
- contain at least 1 number, 1 lower case character and 1 upper case character
- NOT contain your first or last name
- NOT contain your userID
- NOT contain the word 'password'
- NOT contain any special characters
- NOT be a previously used password (if applies)

*New Password

*Re-type New Password

< Previous Next > Cancel Finish

Step 5: Click “Finish” when the message below appears.

Recover Password

Password Assistance - Success

Your new password has successfully been created.

< Previous Next > Cancel Finish

LOCKING USER ACCOUNTS AND RESETTING PASSWORDS

- **Locking User Accounts:** Authorizers have the capability to “Lock User” as shown below. This should be used for staff leaving the municipality or for staff you no longer want to access Online Services.
- **Resetting Passwords:** A Primary Authorizer can reset passwords for other users by selecting the “Reset Password” option. Selecting this option will initiate a temporary password email. After an account is unlocked, the temporary password expires after 45 days.

The screenshot displays the user management interface for the Office of the New York State Comptroller. The left sidebar contains navigation options for OSC INTERNAL and OSC EXTERNAL users. The main content area shows the profile for a user named John Doe. The 'Available Actions' section is expanded, showing several options: 'Reset Password', 'Resend UserId & New Temporary Password', 'Manual Password override - Mon16211831', and 'Lock User'. A red arrow points to the 'Lock User' option, which is highlighted in yellow. The 'Status' is 'Password Sent' and the 'Status Reason' is 'Enrolled - change password on next login'. The 'Logon Failures' are 0.