

Online Services

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

- [ACTIVATING A PRIMARY AUTHORIZER ACCOUNT](#) (Page 2)
- [ASSIGNING ROLES TO A CFO ACCOUNT](#) (Page 8)
- [CREATING PREPARER USER ACCOUNTS](#) (Page 12)

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 ONLINE SERVICES 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> for 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.

Please do not "Reply" directly to this automatically generated message.
For contact information, click <http://www.osc.state.ny.us/portal/contact.htm>

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT (Continued)

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

The screenshot shows the 'Online Services' login page for the New York State Comptroller, Thomas P. DiNapoli. The page is divided into several sections:

- Header:** 'New York State Comptroller Thomas P. DiNapoli' with the state seal logo.
- Online Services:** The main heading for the page.
- Login:** A form with two input fields: '*User ID' (containing 'municipaluser') and '*Password' (masked with dots). There are links for 'I forgot my User ID' and 'I forgot my Password'. A 'Login' button is present, with a mouse cursor hovering over it. Below the button are links for 'Need an account? Enroll Now' and 'Learn more about our Online Services.'
- Announcements:** A section with a placeholder box for an announcement.
- Online Services Applications:** A section with four tabs: 'Government', 'Local Government', 'Vendors', and 'Individuals'. The 'Local Government' tab is selected.
- Applications:** Under the 'Local Government' tab, there are four application cards:
 - VendRep System:** A secure application for vendors to enter and certify their Vendor Responsibility Questionnaires. Includes links for 'More Details' and 'Enroll'.
 - Public Authorities Reporting Information System (PARIS):** An online data entry and collection system for public authorities. Includes a 'More Details' link.
 - Contract Submission System (CSS):** A secure application for State authorities to submit contracts and amendments. The text is partially cut off.
 - Online Claiming:** A secure web application for authorized users to upload files to search and claim unclaimed funds. The text is partially cut off.

ACTIVATING A PRIMARY AUTHORIZER ACCOUNT (Continued)

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

New York State Comptroller
Thomas P. DiNapoli

Online Services Assistance

Password Assistance - Validate Identity

Please enter your First Name and Last Name to validate your identity.

*First Name

*Last Name

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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.”

New York State Comptroller
Thomas P. DiNapoli

Online Services Assistance

Password Assistance - Change Password

Please enter current password and create new password.

User ID municipaluser

***Current Password** [password field]

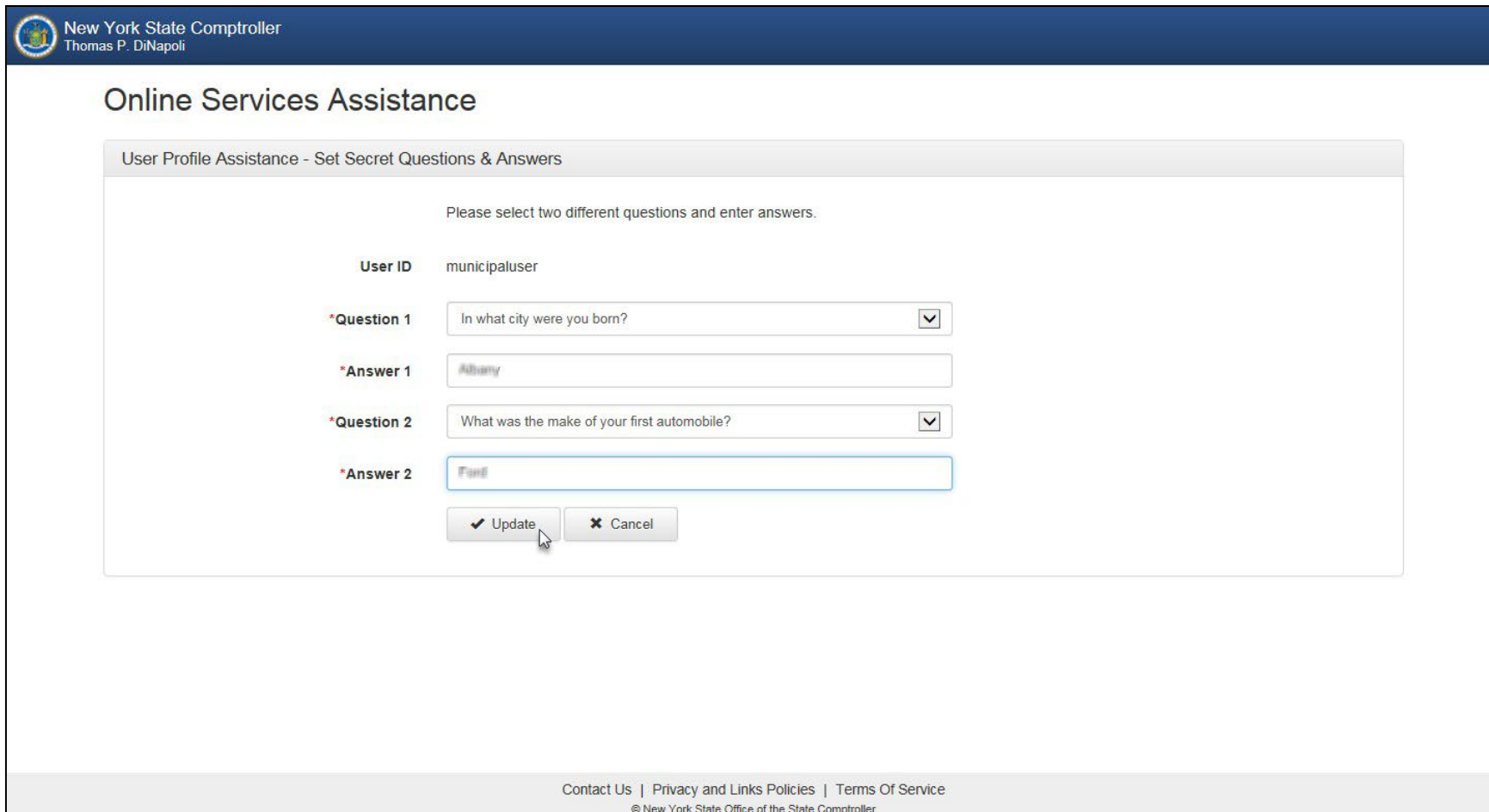
***New Password** [password field]

(8-32 characters. It cannot contain your first or last name, or your userID, or the word 'password', or any special characters. The password must contain at least 1 number, 1 lower case character and 1 upper case character.)

***Re-type New Password** [password field]

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)



The screenshot shows a web interface for setting secret questions. At the top left is the New York State Comptroller logo and name. The main heading is 'Online Services Assistance'. Below it is a sub-heading 'User Profile Assistance - Set Secret Questions & Answers'. The form contains a 'User ID' field with the value 'municipaluser'. There are two question-answer pairs: Question 1 is 'In what city were you born?' with answer 'Albany'; Question 2 is 'What was the make of your first automobile?' with answer 'Ford'. At the bottom are 'Update' and 'Cancel' buttons.

New York State Comptroller
Thomas P. DiNapoli

Online Services Assistance

User Profile Assistance - Set Secret Questions & Answers

Please select two different questions and enter answers.

User ID municipaluser

***Question 1** In what city were you born?

***Answer 1** Albany

***Question 2** What was the make of your first automobile?

***Answer 2** Ford

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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.

The screenshot shows the 'Online Services' dashboard for a user named John Doe (municipaluser). The dashboard is divided into several sections:

- Header:** New York State Comptroller Thomas P. DiNapoli, Users, My Apps, and John Doe (municipaluser).
- Left Sidebar:** Online Services, View, Dashboard (selected), Announcements, User Profile.
- Online Services Applications:** You are currently subscribed to the following applications: No applications available.
- Announcements:** No announcements are visible.
- Municipality Information:**

Municipality Name	City of Albany
Municipality Code	0000000000000000
Number of Users	11
Application(s)	Tax Cap , Tax Limit

[Manage Users](#)
- User Information:**

Name	John Doe
User ID	municipaluser
Previous Last Access	Mar 30, 2015 01:45 PM
Password Expiration Date	Mar 29, 2016 12:00 AM
Created On	Mar 26, 2014 12:36 PM

[Manage Profile](#)

ASSIGNING ROLES TO A CFO 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)*

The screenshot displays the 'Online Services' dashboard for a user named John Doe (municipaluser). The dashboard is divided into several sections:

- Header:** New York State Comptroller Thomas P. DiNapoli, Users, My Apps, and John Doe (municipaluser).
- Left Sidebar:** Online Services View with options for Dashboard, Announcements, and User Profile.
- Online Services Applications:** A section indicating 'No applications available.'
- Announcements:** A section for displaying announcements.
- Municipality Information:** A section containing:
 - Municipality Name: City of Albany
 - Municipality Code: 0000000000000000
 - Number of Users: 11
 - Application(s): Tax Cap , Tax Limit
 - A 'Manage Users' button with a right-pointing arrow.
- User Information:** A section containing:
 - Name: John Doe
 - User ID: municipaluser
 - Previous Last Access: Mar 30, 2015 01:45 PM
 - Password Expiration Date: Mar 29, 2016 12:00 AM
 - Created On: Mar 26, 2014 12:36 PM
 - A 'Manage Profile' button with a right-pointing arrow.

ASSIGNING ROLES TO A CFO ACCOUNT (PRIMARY AUTHORIZER ONLY) (Continued)

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

The screenshot displays the 'City of Albany' Users management interface. The top navigation bar includes the New York State Comptroller logo and name, a 'Users' tab, and a user profile for 'John Doe (municipaluser)'. The left sidebar shows 'Online Services' with a search bar and a 'Municipality Users' button. The main content area features a 'Filters' section with input fields for 'First Name', 'Last Name', 'Primary Email', and 'Status', along with 'Filter' and 'Clear' buttons. 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 'municipaluser' is highlighted, and a dropdown menu is open over the 'Info' icon, showing options: 'Info', 'Permissions', 'Locations', 'Activity Logs', and 'Audit Logs'. The 'Permissions' option is selected.

Actions	User ID	First Name	Last Name	Email	Status
Info					Locked
Info	municipaluser	John	Doe		* Active
Info					Locked
Info					Active
Info					Active
Info					Active
Info					Active

ASSIGNING ROLES TO A CFO ACCOUNT (PRIMARY AUTHORIZER ONLY)

Step 3: The Permissions tab will default to the Enrollment section where the Annual Financial Reporting Authorizer box should be checked (for CFO user accounts only). To assign the CFO role for Annual Financial Report - AFR, select “Annual Financial Report” underneath Online Services Applications.

(Note: The role of Annual Financial Report 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.)

There are two available roles available in AFR: Municipality Chief Financial Officer or Municipality AFR Preparer. Below is a description of each role.

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 filing.

Municipality AFR Preparer: Can read all certified and uncertified filing data, can edit all uncertified filing data, and can mark filing as ready for certification.

The screenshot shows the 'Online Services Applications' interface. At the top, there are navigation tabs: 'Info', 'Permissions', 'Locations', 'Activity Logs', and 'Audit Logs'. Below this, the 'Enrollment (ENROLLMENT) 2' tab is active. Underneath, two systems are listed: 'Local Government Real Property Tax Cap Filing System (LGPTC)' and 'Local Government Annual Financial Reporting System (LGAFR)'. A red arrow points to the 'LGAFR' system, which has a red circle with the number '1' next to it. Below the system list, there is a table of roles. The 'Annual Financial Reporting Authorizer' role is selected, and its description is visible: '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.' At the bottom of the screenshot, a red note reads: '*Authorizer Role should be limited to CFO's only*'.

ASSIGNING ROLES TO A CFO ACCOUNT (PRIMARY AUTHORIZER ONLY)

Step 4: 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. You need to log out of the website and completely close out of the web browser in order for the changes to take effect. If you are not creating any preparer accounts, please refer to the [AFR User Manual](#) for the next step to start filing.

(Note: Only one role should be selected for each user account.)

The screenshot displays the 'Permissions' tab of an online services application. Under the 'Online Services Applications' section, the 'Local Government Annual Financial Reporting System (LGAFR)' is selected and highlighted in blue. Below this, two roles are listed with checkboxes:

- 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 box for the 'Municipality Chief Financial Officer' role.

CREATING PREPARER USER ACCOUNTS (PRIMARY AUTHORIZER ONLY)

Step 1: Select “Local Government Annual Financial Reporting System” by selecting, “Apps” at the top.

The screenshot displays the 'Online Services' dashboard. At the top left, the logo for the Office of the New York State Comptroller is shown, along with the text 'Office of the New York State Comptroller' and 'NYS Comptroller Thomas P. DiNapoli'. A red 'TEST' button is visible next to the name. The main header is 'Online Services' in a blue bar. On the right side of this bar, there is a dropdown menu labeled 'Apps' which is currently open, showing 'Local Government Annual Financial Reporting System' as the selected option. On the left side, there is a sidebar with a 'VIEW' section containing 'Dashboard', 'Announcements', and 'User Profile'. The 'Dashboard' option is highlighted. The main content area is titled 'Welcome to Online Services'. It features two panels: 'Online Services Applications' and 'Announcements'. The 'Online Services Applications' panel contains the text 'You are currently subscribed to the following applications:' and a single application card for 'Annual Financial Reporting'. The 'Announcements' panel contains a yellow banner with an information icon and the text 'No announcements to report.'

CREATING PREPARER USER ACCOUNTS (Continued)

Step 2: 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)*

The screenshot displays the 'Online Services' dashboard for a user named John Doe (municipaluser). The dashboard is divided into several sections:

- Header:** Includes the New York State Comptroller logo and name (Thomas P. DiNapoli), a 'Users' link, and a 'My Apps' dropdown menu.
- Left Sidebar:** Contains navigation links for 'Dashboard', 'Announcements', and 'User Profile'. The 'Dashboard' link is currently selected.
- Main Content Area:**
 - Welcome to Online Services:** A large heading at the top of the main content area.
 - Online Services Applications:** A section titled 'Online Services Applications' with the text 'You are currently subscribed to the following applications:'. Below this, a yellow message box states 'No applications available.'
 - Announcements:** A section titled 'Announcements' with a placeholder for an announcement.
 - Municipality Information:** A section displaying details for the 'City of Albany'. It lists:
 - Municipality Name:** City of Albany
 - Municipality Code:** 0000000000000000
 - Number of Users:** 11
 - Application(s):** Tax Cap , Tax LimitA 'Manage Users' button is located at the bottom of this section.
 - User Information:** A section displaying details for the user 'John Doe'. It lists:
 - Name:** John Doe
 - User ID:** municipaluser
 - Previous Last Access:** Mar 30, 2015 01:45 PM
 - Password Expiration Date:** Mar 29, 2016 12:00 AM
 - Created On:** Mar 26, 2014 12:36 PMA 'Manage Profile' button is located at the bottom of this section.

CREATING PREPARER USER ACCOUNTS (Continued)

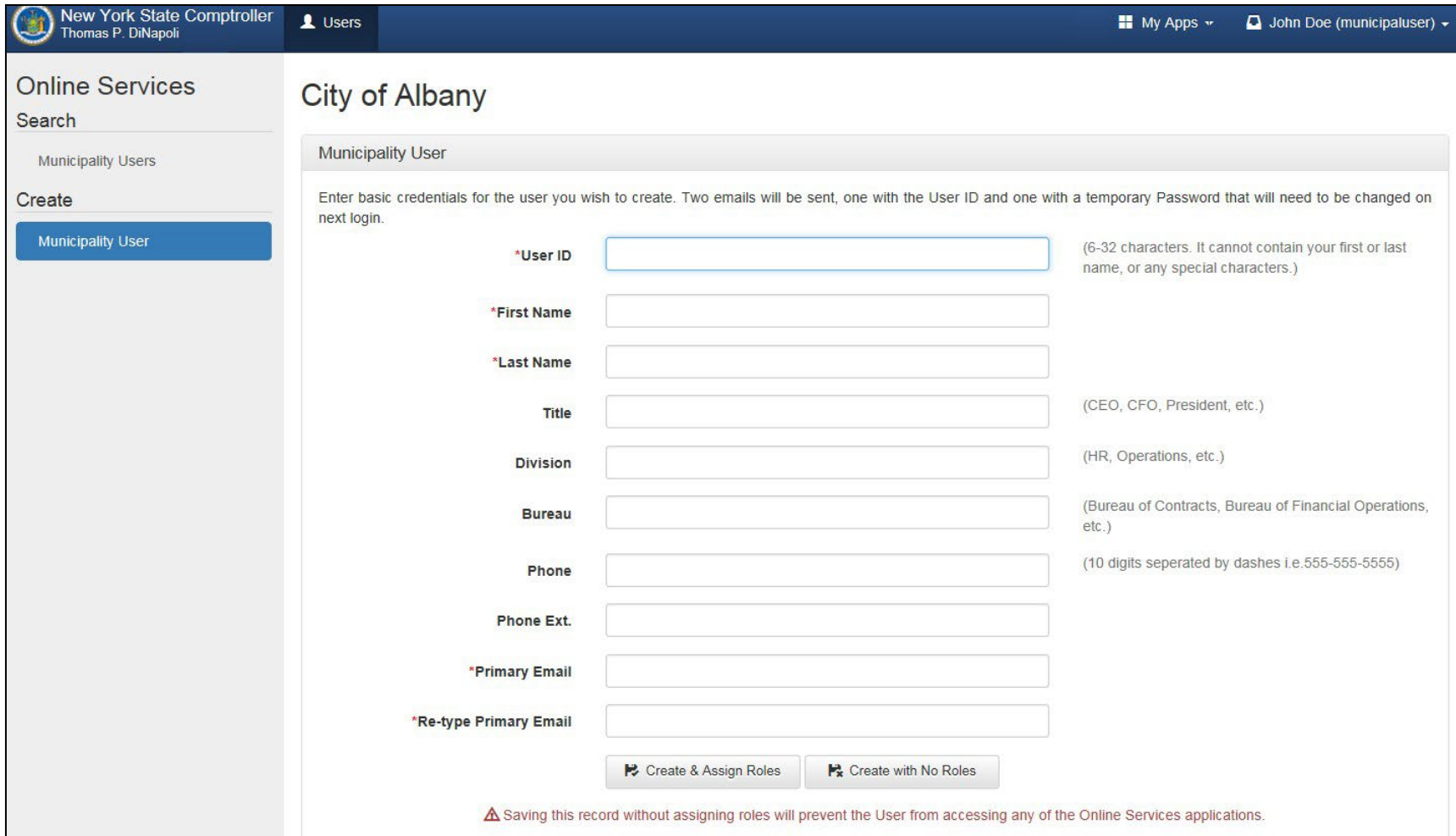
Step 3: Select “Municipality User” underneath Create on the left-hand side.

The screenshot displays the 'Users' management interface for the City of Albany. The top navigation bar includes the New York State Comptroller logo and name, the 'Users' section, and user information for 'John Doe (municipaluser)'. The left sidebar shows 'Online Services' with a search bar and a 'Create' section where 'Municipality User' is highlighted. The main content area is titled 'City of Albany' and contains a 'Filters' section with input fields for 'First Name', 'Last Name', 'Primary Email', and 'Status', along with 'Filter' and 'Clear' buttons. Below the filters is a 'Results' section showing 'Displaying 1 to 11 of 11' users. A table lists the users with columns for 'Actions', 'User ID', 'First Name', 'Last Name', 'Email', and 'Status'. The 'municipaluser' entry is highlighted, showing it is 'Active'.

Actions	User ID	First Name	Last Name	Email	Status
Info	Locked
Info	municipaluser	John	Doe	...	* Active
Info	Locked
Info	Active
Info	Active

CREATING PREPARER USER ACCOUNTS (Continued)

Step 4: Fill in the new user's information and select "Create and Assign Roles" at the bottom.



New York State Comptroller
Thomas P. DiNapoli

Users

My Apps

John Doe (municipaluser)

Online Services

Search

Municipality Users

Create

Municipality User

City of Albany

Municipality User

Enter basic credentials for the user you wish to create. 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.

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

***First Name**

***Last Name**

Title (CEO, CFO, President, etc.)

Division (HR, Operations, etc.)

Bureau (Bureau of Contracts, Bureau of Financial Operations, etc.)

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

Phone Ext.

***Primary Email**

***Re-type Primary Email**

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

CREATING PREPARER USER ACCOUNTS (Continued)

Step 5: 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. For a Preparer user account, no boxes should be checked in the Enrollment Section. To assign the Preparer role for Annual Financial Report - AFR, select “Annual Financial Report” underneath Online Services Applications.

(Note: The role of Annual Financial Report 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 'Online Services Applications' interface. At the top, there are navigation tabs: 'Info', 'Permissions' (selected), 'Locations', 'Activity Logs', and 'Audit Logs'. Below the tabs, the 'Enrollment (ENROLLMENT)' section is active, showing two systems:

- Local Government Real Property Tax Cap Filing System (LGPTC) 6
- Local Government Annual Financial Reporting System (LGAFR) 1

Below the system list, there is a table of roles with checkboxes for selection:

<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	Municipal Tax Data Authorizer Authorizer role that can view/create/update/delete any Tax Data Verification User for their municipality but has no read-only/edit/send/approve privileges for any Tax Data Verification data.
<input type="checkbox"/>	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.
<input type="checkbox"/>	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 PREPARER USER ACCOUNTS (Continued)

Step 6: 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. You need to log out of the website and completely close out of the web browser in order for the changes to take effect.

(Note: Only one role should be selected for each user account.)

The screenshot displays a web application interface with a navigation bar at the top containing 'Info', 'Permissions', 'Locations', 'Activity Logs', and 'Audit Logs'. Below the navigation bar, there is a section titled 'Online Services Applications' with a sub-section 'Enrollment (ENROLLMENT)'. Under 'Enrollment (ENROLLMENT)', there are three items: 'Local Government Real Property Tax Cap Filing System (LGPTC)' with a red circle containing the number 5, 'Local Government Annual Financial Reporting System (LGAFR)' with a white circle containing the number 1, and a list of roles. The 'Municipality AFR Preparer' role is selected, indicated by a checked checkbox and a blue background highlight. A red arrow points to the checked checkbox. The 'Municipality Chief Financial Officer' role is unselected, indicated by an unchecked checkbox.

Role	Description	Selected
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.	<input checked="" type="checkbox"/>

CREATING PREPARER USER ACCOUNTS (Continued)

Step 7: 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)

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 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> for 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 [REDACTED] 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.

Please do not "Reply" directly to this automatically generated message.
For contact information, click <http://www.osc.state.ny.us/portal/contact.htm>

CREATING PREPARER USER ACCOUNTS (Continued)

Step 8: 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.


(Note: Only a CFO that 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 'Example TOWN'. The filing period is '01/01/2023 - 12/31/2023' with a status of 'Available'. The 'Filing Information' section shows a due date of '03/01/2024' and status 'Available'. It also indicates that no CFO or preparers have been assigned to this filing. The 'Workflow' section contains 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 red arrow points to the 'Start Filing' button within this section.

CREATING PREPARER USER ACCOUNTS (Continued)

Step 9: 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
Jay Phillips (tnhem003)

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

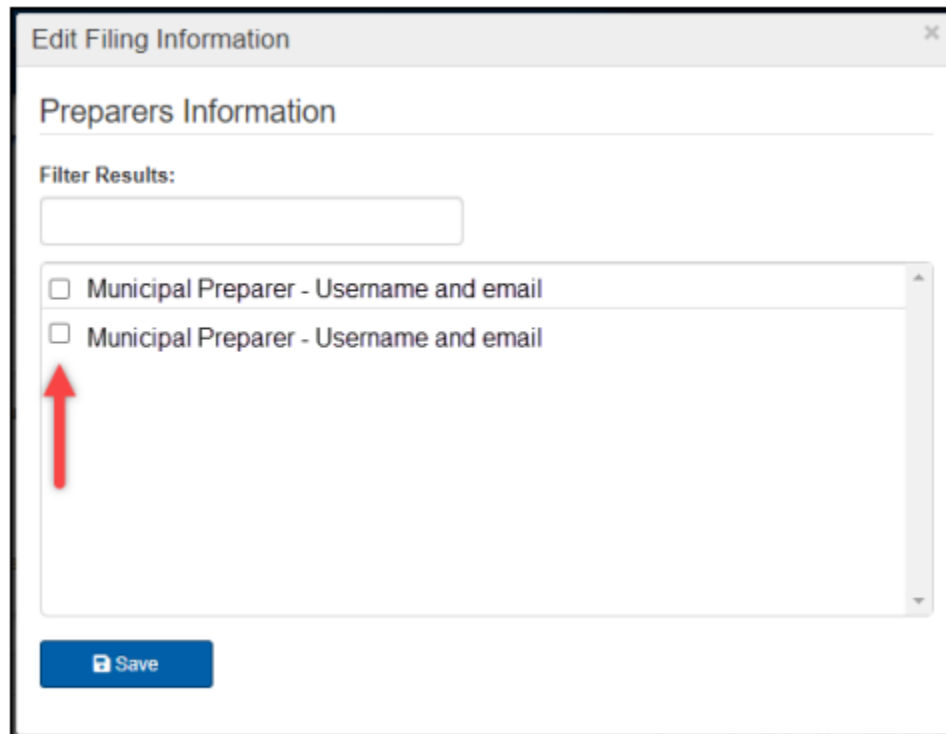
Tasks

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 (Continued)

Step 10: Check off the user that you would like to grant access to prepare the report and click Save.

(Note: 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 the window, there is a section titled "Preparers Information". Below this title is a "Filter Results:" label followed by an empty text input field. Underneath the filter field is a scrollable list box containing 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 of the window is a blue button with a white floppy disk icon and the text "Save".