New York State Comptroller
Thomas P. DiNapoli

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 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 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.

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.

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."

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Online Services Assistance

Password Assistance - Change Password

Please enter current password and create new password.

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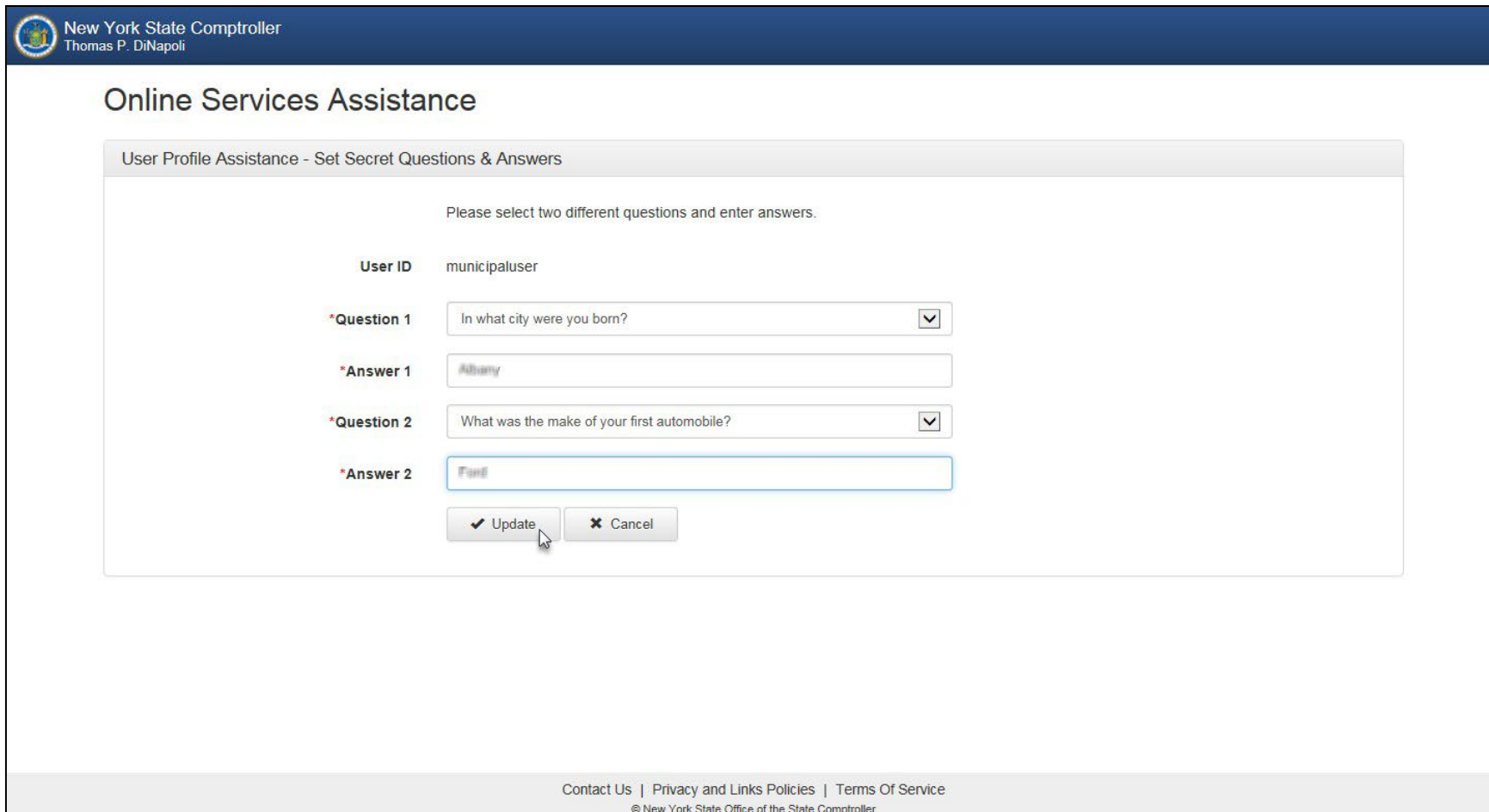
(8-32 characters. It cannot contain your first or last name, or your userID, or the word 'password', or any special characters. The password must contain at least 1 number, 1 lower case character and 1 upper case character.)

***Re-type New Password**	••••••••••••

✔ Update   ✖ Cancel

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 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)*

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."

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.

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.)

CREATING PREPARER USER ACCOUNTS (PRIMARY AUTHORIZER ONLY)

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

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)*

CREATING PREPARER USER ACCOUNTS (Continued)

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

CREATING PREPARER USER ACCOUNTS (Continued)

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

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.)

ⓘ Info	🔒 Permissions	📍 Locations	☰ Activity Logs	⏱ Audit Logs

Online Services Applications

Enrollment (ENROLLMENT)

Local Government Real Property Tax Cap Filing System (LGPTC) **6**

Local Government Annual Financial Reporting System (LGAFR) **1**

☐	**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.
☐	**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.
☐	**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 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.)

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)

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.)

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.

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.)