



New Official Quick Start Guide

Congratulations on your new position! OSC's Division of Local Government and School Accountability (LGSA) looks forward to working with you as you fulfill your new duties. If you are a new CEO, CFO or Clerk, this Quick Start Guide provides you with a list of essential tasks that you must perform and important contact information to help you get started in your new role.

Important Tasks

1. Update Your Contact Information

To ensure you receive important communications from OSC, have your clerk ensure all contacts are up to date by logging onto the Contact Update Database (www.osc.ny.gov/local-government/resources/contact-update-and-online-help) or contact us at AFRfile@osc.ny.gov, (518) 474-6975, or (866) 321-8503, option 4.

2. Update New Justices

Town and village clerks need to notify the Justice Court Fund (JCF) of newly elected justices. JCF will mail the new justice their justice ID number along with guidance on their responsibilities. After the new justice receives their official email address from the Office of Court Administration, JCF will email the justice with the credentials necessary to file monthly reports. For any questions, contact JCF at courtfund@osc.ny.gov or (866) 321-8503, option 2.

3. Update Users in Online Services

Ensure all the users and their access rights are correct in Online Services (<https://onlineservices.osc.state.ny.us/Enrollment/login?0>). Only Chief Financial Officers (CFOs) can enroll an account in Online Services. Once the CFO establishes an account, they can create user accounts for the local government. If you need assistance, including a username or password, contact LGSA's Help Line at LocalGov@osc.ny.gov, (518) 408-4934, or (866) 321-8503, option 1.

4. Log Into the Academy for Local Government Officials

Be sure to log into the Academy for Local Government Officials (www.osc.state.ny.us/local-government/academy) where you will find accounting schools, seminars and webinars, and can request training, ask technical questions and access resources.

5. Check for Required Reporting

Visit our website, www.osc.state.ny.us/local-government/required-reporting for information and due dates for the annual reports, justice court reports, real property tax cap, constitutional tax limit and other required reporting for local governments.

Important Contacts

Regional Offices (RO)

Your RO will be a great resource. For questions on audits, scheduled or in-progress; questions on auditing and accounting standards; and requests for technical assistance contact your RO. For a directory of ROs, go to: www.osc.state.ny.us/files/local-government/pdf/regional-directory.pdf.

Data Management Unit (DMU) • AFRfile@osc.ny.gov • (518) 474-6975 or (866) 321-8503, option 4

DMU is responsible for collecting and reviewing all Annual Financial Reports (AFRs) and updating contact information for the various local governments. The data collected is publicly released on our website and used for various releases such as the Fiscal Stress Monitoring System.

The Local Official Training Unit (LOT) • Localtraining@osc.ny.gov • (518) 375-8362

The mission of LOT is to help New York State's local government and school district officials carry out their day-to-day responsibilities by increasing their knowledge of public finance, fiscal management and accountability.

The Justice Court Fund Unit (JCF) • courtfund@osc.ny.gov • (866) 321-8503, option 2

JCF staff review monthly reports submitted by town and village justices and invoices the town or village for the appropriate share due to the State and County. JCF also provides technical assistance.

The Monitoring and Analysis Unit (MAU) • LGSAMonitoring@osc.ny.gov • (866) 321-8503, option 3

MAU monitors compliance with tax data verification, the tax cap legislation and the Constitutional Tax Limit, and aids local officials in meeting their filing requirements. Also, MAU is responsible for certifying general purpose State aid payments, such as the Aid and Incentives for Municipalities (AIM) program (www.osc.state.ny.us/local-government/data/aid-and-incentives-municipalities-aim-and-aim-related-payments).

LGSA Help Line • localgov@osc.ny.gov • (518) 408-4934 or (866) 321-8503, option 1

The LGSA Help Line provides customer service for local officials related to online services. If you need help and are unsure of where to start, contact the LGSA Help Line.

Important Resources

LGSA Website

Visit our website www.osc.state.ny.us/local-government to find information from LGSA including audits of local governments, the Fiscal Stress Monitoring System, local government data and other resources.

Publications

Go to www.osc.state.ny.us/local-government/publications to access LGSA's publications, including Accounting and Reporting Manuals (ARMs), accounting notices and bulletins, annual reports, cost-savings ideas, guidance, Local Government Management Guides and research reports.