

This guide provides the instructions necessary for assigning Tax Limit user roles and navigating the Constitutional Tax Limit application.

The municipality's Chief Financial Officer (CFO) will receive a notification via email indicating that the current year's Constitutional Tax Limit form is available through the OSC Online Services (the Portal).

Each CFO should have received an enrollment email notification with the login and password to complete the enrollment process for the municipality.

Once the email notification to file the Constitutional Tax Limit is received, the CFO (as the municipal authorizer already set up in Online Services) must assign roles to users for the Constitutional Tax Limit application. The roles can be assigned to the municipal authorizer or new users can be set up and assigned roles.

**The Constitutional Tax Limit roles are defined as follows:**

**Municipal Authorizer:** Can edit own permissions, create additional users, and edit other user permissions and information.

Has no view/create/update/delete privileges for Tax Limit data

(Note: You cannot remove the Municipal Tax Limit Authorizer Role from yourself)

**Municipal Tax Limit Certifier:** Can only certify a form and submit budget files once the form is completed; has read-only access to view all data entered

**Municipal Tax Limit Reviewer:** Has read-only access to all data; has no create/update/delete privileges

**Municipal Tax Limit Preparer:** Has create/update/delete access to all unsubmitted Tax Limit report data

To log into Online Services, the CFO/Municipal Authorizer will use the following link: [OSC Online Services - Enrollment](#)

Once logged in, the Authorizers do not have any access to their CTL application until they assign themselves roles or add new users with assigned roles.

Online Services

## Online Services

**Login**

\*User ID  [I forgot my User ID](#)

\*Password  [I forgot my Password](#)

Need an account ? [Enroll Now](#)

[Learn more about our Online Services.](#)

**Announcements**

No announcements to report.


**Online Services Applications**

Government
Local Government
Vendors
Individuals

 **VendRep System**  
 The VendRep System is a secure application which allows vendors to enter, maintain and certify their Vendor Responsibility Questionnaires. Once the questionnaire is certified, it is available for review by authorized New York State Contracting Entity users. Access to New York State contract data is also available through the VendRep System.  
[More Details](#) [Enroll](#)

 **Contract Submission System**  
 The Contract Submission System (CSS) is a secure application which allows State

 **Public Authorities Reporting Information System**  
 The Public Authorities Reporting Information System (PARIS) is an online data entry and collection system. Public Authorities use PARIS to comply with various statutory and regulatory requirements of public authorities law, general municipal law and OSC regulations.  
[More Details](#)

 **Online Claiming**  
 The Online Claiming is a secure web application where authorized users can upload

To assign roles or add new users, the Authorizer uses the Manage Users button under Municipality Information

The screenshot shows the 'Online Services' dashboard for a user named 'County CFO (MunicipalAuthorizer)'. The dashboard includes a sidebar with 'Dashboard', 'Announcements', and 'User Profile'. The main content area is titled 'Welcome to Online Services' and contains several sections:

- Online Services Applications:** A box stating 'You are currently subscribed to the following applications:' with a 'Tax Limit' application listed.
- Announcements:** A yellow box with an information icon and the text 'No announcements to report.'
- Municipality Information:** A table with the following data:

Municipality Name	New York City County
Municipality Code	600100000000
Number of Users	2
Application(s)	Tax Limit

Below the table is a 'Manage Users' button with a right-pointing arrow. A red arrow points to the 'Municipality Information' header, and another red arrow points to the 'Manage Users' button.
- User Information:** A table with the following data:

Name	County CFO
User ID	MunicipalAuthorizer
Previous Last Access	Nov 02, 2015 11:35 AM
Password Expiration Date	Nov 01, 2016 12:00 AM
Created On	Nov 20, 2013 11:10 AM

Below the table is a 'Manage Profile' button with a right-pointing arrow.

To set or change permissions on a user, select the down arrow on the info button for the user and select Permissions

New York State Comptroller  
Thomas P. DiNapoli TEST

Online Services Users Apps County CFO (MunicipalAuthorizer)

AUTHORIZER

View Municipality Users

Add Municipality User

### New York City County

Filters

First Name Last Name Primary Email Status Filter Clear

Results

Displaying 1 to 2 of 2 [first] [prev] 1 [next] [last]

Actions	User ID	First Name	Last Name	Email	Status
Info	MunicipalAuthorizer	County	CFO	amccabe@osc.state.ny.us	* Active
	CountyPreparer	Mary	Lamb	amccabe@osc.state.ny.us	* Active

### Select Tax Limit

Online Services Users Apps County CFO (MunicipalAuthorizer)

## County CFO (MunicipalAuthorizer)

[Info](#) [Permissions](#) [Locations](#) [Activity Logs](#) [Audit Logs](#)

Online Services Applications

[Enrollment 1](#) [Tax Limit](#)

**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.*

Municipality Enrolled Information

Municipality Code	600100000000	Status	Active
Municipality Name	New York City County		

Select any or all of the roles available on the screen (Preparer, Reviewer and/or Certifier)

Online Services Users Apps County CFO (MunicipalAuthorizer)

**AUTHORIZER**

- View Municipality Users
- Add Municipality User

**COUNTY CFO**

- View User**

### County CFO (MunicipalAuthorizer)

[Info](#) [Permissions](#) [Locations](#) [Activity Logs](#) [Audit Logs](#)

Online Services Applications

[Enrollment](#) [Tax Limit](#)

- 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.

Municipality Enrolled Information

<b>Municipality Code</b>	600100000000	<b>Status</b>	<b>Active</b>
<b>Municipality Name</b>	New York City County		



Once a role has been selected, it will be highlighted in blue with a check mark in the box and the Tax Limit application will then be accessible either through the Apps button in the upper right corner of the screen or by returning to the Dashboard using the arrow next to your user name and then selecting Tax Limit from the Dashboard under Online Services Applications.

The screenshot displays the 'County CFO (MunicipalAuthorizer)' page in the 'Local Government Constitutional Tax Limit Filing System'. The top navigation bar includes the user name 'Thomas P. DiNapoli' and an 'Apps' dropdown menu. A red arrow points to the 'Apps' button, and another red arrow points to the 'County CFO (MunicipalAuthorizer)' dropdown. The left sidebar contains 'AUTHORIZER' and 'COUNTY CFO' sections, with a 'View User' button under 'COUNTY CFO'. The main content area shows 'Online Services Applications' with 'Enrollment' (1) and 'Tax Limit' (2) tabs. Below this, three roles are listed: 'Tax Limit Certifier' (checked), 'Tax Limit Reviewer' (unchecked), and 'Tax Limit Preparer' (checked). The 'Municipality Enrolled Information' section at the bottom shows 'Municipality Code' 600100000000, 'Municipality Name' New York City County, and 'Status' Active.

To create additional users, select **Add Municipality User** button from the menu on the left side of the screen.

Complete all fields including assigning a unique user ID and select **Create & Assign Roles** button

Online Services Users Apps County CFO (MunicipalAuthorizer)

**AUTHORIZER**

[View Municipality Users](#)

**Add 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 seperated 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.



**A message will be displayed that the user was successfully created. Roles can then be assigned from the Tax Limit Permissions tab.**

**Only the authorizer account user can add new users or edit user information. A municipality may have more than one authorizer.**

**To edit user information or permissions, the user must be in the enrollment application section under Apps, not in any tax applications.**

The screenshot shows the 'Users' management interface. At the top, there are navigation tabs for 'Info', 'Permissions', 'Locations', 'Activity Logs', and 'Audit Logs'. A red arrow points to the 'Apps' dropdown menu in the top right corner. Below the navigation, a green message bar states 'User 'Mary Lamb' created successfully.' A second red arrow points to this message. On the left sidebar, under the 'AUTHORIZER' section, there are buttons for 'View Municipality Users' and 'Add Municipality User'. Below that, under the 'MARY LAMB' section, there is a 'View User' button. The main content area is titled 'Online Services Applications' and has two tabs: 'Enrollment' and 'Tax Limit'. The 'Tax Limit' tab is active, showing a list of roles 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.

**Once the new user is successfully created, an email with the new user id is sent to the user and copied to the authorizer creating the account.**

**A second email with a temporary password is sent only to the new user. This temporary password will expire after 30 days.**

**Password resets expire the day after they are issued.**

**Once the new user logs in, they will be prompted to validate their identity**

## Online Services Assistance

Password Assistance - Validate Identity

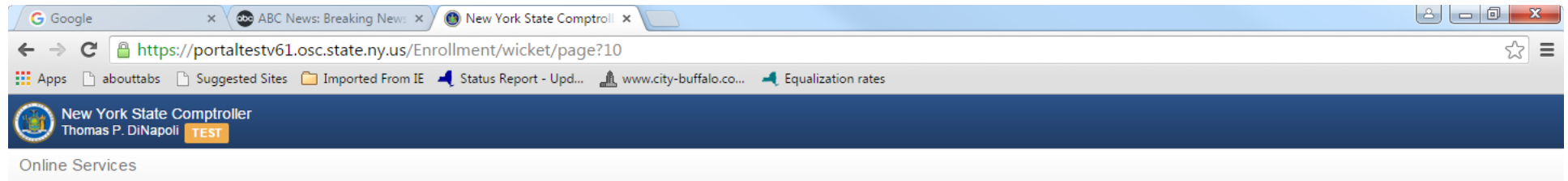
Please enter your First Name and Last Name to validate your identity.

\*First Name

\*Last Name

**They will then be prompted to change their password and then set up their security questions.**

**Two emails will then be sent to the new user confirming that the password has been successfully changed and the security questions set up.**



## Online Services Assistance

Password Assistance - Change Password

Please enter current password and create new password.

User ID: ctttestnorthhillspreparer

\*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:



## Online Services Assistance

User Profile Assistance - Set Secret Questions & Answers

Please select two different questions and enter answers.

User ID: cttestnorthhillspreparer

\*Question 1:

\*Answer 1:

\*Question 2:

\*Answer 2:

After setting up the new password and security questions, the Tax Limit application can be selected using the down arrow next to Apps in the upper right corner of the screen or by selecting Tax Limit under the Online Services Applications section of the Dashboard

The screenshot shows the 'Online Services' dashboard for a user named 'County CFO (MunicipalAuthorizer)'. The dashboard is titled 'Welcome to Online Services' and features several sections:

- Online Services Applications:** A section titled 'You are currently subscribed to the following applications:' containing a single button labeled 'Tax Limit'. A red arrow points to this button.
- Announcements:** A section with a yellow background and an information icon, stating 'No announcements to report.'
- Municipality Information:** A table with the following data:

Municipality Name	New York City County
Municipality Code	600100000000
Number of Users	2
Application(s)	Tax Limit

A 'Manage Users' button is located below the table.
- User Information:** A table with the following data:

Name	County CFO
User ID	MunicipalAuthorizer
Previous Last Access	Nov 02, 2015 11:35 AM
Password Expiration Date	Nov 01, 2016 12:00 AM
Created On	Nov 20, 2013 11:10 AM

A 'Manage Profile' button is located below the table.

In the top right corner, there is a navigation bar with 'Apps' and 'County CFO (MunicipalAuthorizer)'. A red arrow points to the 'Apps' dropdown menu, which has a small downward arrow next to it.

After the Constitutional Tax Limit Application is selected, the municipality’s CTL home page will open and the Fiscal Year link highlighted can be selected to open a form.

The question mark icons throughout the application will provide guidance on the field contents when selected.

Office of the State Comptroller  
**Online Services**

New York State Comptroller  
Thomas P. DiNapoli

Amy McCabe (ctlitestardsleyauthorizer) Logout

My Apps ▾

Home | News | My Profile

**Constitutional Tax Limit** Village of Ardsley (550434200220)

**Tax Limit Form Selection**

Feedback

OSC CTL Website

**Welcome!**

**Your Municipality must...**

- Submit a Tax Limit Form
- Submit a copy of the adopted budget
- Complete the Certification process

[Who can do this?](#)

**Getting Started...**

- Select the appropriate Tax Limit Form
- Use the menu on the left to navigate to the desired area

[What forms can I edit?](#)

**Getting Help...**


Throughout the application, you will see icons. Click one for more information about the corresponding topic.

Fiscal Year	Status	Status Date
<a href="#">05/31/2016</a>	Open	11/02/2015
<a href="#">05/31/2015</a>	Accepted by OSC	11/02/2015

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The “Who can do this” link provides the following:

Guidance 


**A Preparer can...**

- Enter the required information in the Tax Limit form
- Enter Debt Exclusions and Schedule information

**A Certifier can...**

- Submit a Tax Limit form
- Submit a copy of the adopted budget
- Certify the submission

The “What forms can I edit” link provides the following:

Guidance 

Forms in the following statuses **can** be edited...

- Not Started
- Open
- Pre-Budget Data Submitted
- Resubmit

Forms in the following statuses **cannot** be edited...

- Certified
- Accepted by OSC

**Before the Tax Limit form and full menu will open for the first time, all the following wizard steps must be completed.**

**Each step can be saved without completing the entire wizard but the form and menu will not be available until all the initial steps are completed.**

**Only villages must first confirm that their assessing status on file is correct by selecting Yes and using the Next button.**

**If this question is answered No, that the assessing status on file is incorrect, the form will lock and you will need to contact us.**

## Constitutional Tax Limit

Village of Cornwall-On-Hudson (330420201160)  
Fiscal Year Ending: 02/28/2016

Tax Limit Form Selection

Tax Limit Form

Feedback

OSC CTL Website

### Assessing Status

Form Status: **Open**

**Assessing Status:**  
Non-Assessing

**Is this Assessing Status correct?**  
 Yes  No



All villages and cities must enter the Taxable Assessed Value for the most recently completed assessment roll.

This is the taxable value that real property taxes will be levied on for the fiscal year.

## Constitutional Tax Limit

Village of Cornwall-On-Hudson (330420201160)  
Fiscal Year Ending: 02/28/2016

Taxable Assessed Value Form Status: **Open**

Taxable Assessed Value	ORPTS Final Roll Date
<input type="text"/> ?	07/01/2014

[Tax Limit Form Selection](#)  
[Tax Limit Form](#)  
[Feedback](#)  
[OSC CTL Website](#)


The budget adoption date and total budgeted real property tax levy must be entered and Next selected to complete the wizard.

## Constitutional Tax Limit

Village of Cornwall-On-Hudson (330420201160)  
Fiscal Year Ending: 02/28/2016

Tax Levy Form Status: **Open**

**Budget Adoption Date:**  
 /  /

**Tax Levy:**  
 

The Tax Limit form, the checklist and the full menu will appear once all of the wizard steps have been successfully completed.

The checklist will indicate required pages with an asterisk and a green check mark will indicate a page that has been successfully completed.

The top section of the form displays the entries made in the wizard process with edit links to make changes to any of these entries.

Tax Limit Form Selection

Tax Limit Form

Schedules

Debt Exclusions

Certification

Feedback

OSC CTL Website

Print/View Summary

Checklist

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\* indicates required elements

\*Tax Limit Form

Schedule A

Schedule B

Schedule C

Other Exclusions

Debt Exclusions

\*Certification

### Tax Limit Form

Form Status: Open

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Assessing Status [Edit](#)

Non-Assessing

Taxable Assessed Value [Edit](#)

<b>Taxable Assessed Value</b>	<b>ORPTS Final Roll Date</b>
\$1,500,000	09/15/2014

Budget [Edit](#)

**Budget Adoption Date:**  
04/20/2015

**Tax Levy:**  
\$2,000,000

The bottom part of the Tax Limit Form page will show all of the Tax Limit calculations.

For cities and villages, the assessment roll dates, equalization rates and dates will be pre-populated with information from the Office of Real Property Tax Services.

Fiscal Year	Assessment Roll Date	Taxable Assessed Value	Equalization Rate Established Date	Equalization Rate ?	Taxable Full Value ?
2016	09/15/2014	\$1,500,000	10/29/2014	0.0333	\$45,045,045
2015	09/15/2013	\$30,134,615	10/18/2013	0.0351	\$858,536,040
2014	09/15/2012	\$30,381,521	11/29/2012	0.0336	\$904,211,935
2013	09/15/2011	\$30,935,284	11/21/2011	0.0341	\$907,193,079
2012	04/01/2011	\$31,178,087	06/16/2011	0.0317	\$983,535,868


Five Year Total Full Valuation	\$3,698,521,967
Five Year Average Full Valuation ?	\$739,704,393
Constitutional Tax Limit ?	\$14,794,088
Tax Levy	\$2,000,000
Total Exclusions ?	\$0
Tax Levy Subject to Tax Limit ?	\$2,000,000
Percentage of Tax Limit Exhausted ?	13.52%
Constitutional Tax Margin ?	\$12,794,088

Counties will provide the following information through the initial wizard process:

The county taxable equalized (full) value:

**Full Value** Form Status: **Resubmit**

Full Value:




The budget adoption date and total county-wide budgeted real property tax levy:

**Total County-Wide Ad Valorem Tax Levy** Form Status: **Resubmit**

Budget Adoption Date:

/  /

Total County-Wide Ad Valorem Tax Levy:



**Any credits to or payments by Towns to reduce the county levy:**

**Credits**

Form Status: **Resubmit**

**Prior Year Surplus Sales Tax:**

**Sales Tax Credit to Reduce County Levy on Towns:**

**Payments by Town to Reduce County Levy:**

**Other Credits:**

Cancel

Save and Close

Previous

Next

The net county real property tax levy and tax limit is calculated based on these entries.







Schedule D entries for charge backs and part county taxes are added to arrive at the total county tax levy.

Tax Levy Calculations

Total Credits	\$336,403
Net Tax Levy	\$37,991,048
Real Estate and Chargebacks from Schedule D	\$647,647
<b>Total Tax Levy</b>	<b>\$38,638,695</b>

Tax Limit Calculations

Fiscal Year	Taxable Full Value
2015	\$4,479,541,812
2014	\$4,351,037,688
2013	\$4,315,726,878
2012	\$4,326,388,709
2011	\$4,355,859,715

Five Year Total Full Valuation	\$21,828,554,802
Five Year Average Full Valuation 	\$4,365,710,960
Constitutional Tax Limit 	\$87,314,219
Total Tax Levy	\$38,638,695
Total Exclusions 	\$4,997,836
Tax Levy Subject to Tax Limit 	\$33,640,859
Percentage of Tax Limit Exhausted 	38.53%
Constitutional Tax Margin 	\$53,673,360

To enter debt exclusions, select from the menu on the left side of the screen or from the checklist on the top of the screen.

Each type of debt (Revenue Producing, Water, Other) must be selected from the drop down box and reported separately. All fields are required.

Save each entry as it is completed and it will be added to a list of entries on the page. There is no limit on the number of entries that can be made

Form Selection

\* indicates required elements

*Tax Limit Form	*Schedule A	Schedule B	Schedule C	Other Exclusions	*Debt Exclusions	*Certification
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Debt Exclusions

**What this is...**

For a detailed explanation of Debt Exclusions, click here ?

**How to proceed...**

If your Municipality has such debt, your should enter each occurrence of it, by type.

**Please note...**

When **Revenue Producing Improvement Debt** entries exist, **Schedule A** information must also be entered in **Schedules**.

**Type of Debt:**

Revenue Producing Improvements Debts - Bonds ?

**Description:**

sewer system improvements

**Principal Amount:**

250,000

**Interest Amount:**

25,000



Select Schedules from the menu on the left side of the screen to see a summary page of all schedules.

Access individual schedules by using the schedule menu on the left or selecting a schedule from the checklist.

## Constitutional Tax Limit

Village of Islandia (470442102465)  
Fiscal Year Ending: 12/31/2015

**Tax Limit Form Selection**

**Tax Limit Form**

**Schedules**

Schedule A

Schedule B

Schedule C

Other Exclusions

Debt Exclusions

Certification

Feedback

OSC CTL Website

Print/View Summary

Checklist

\* indicates required elements

*Tax Limit Form	Schedule A	Schedule B	Schedule C	Other Exclusions	Debt Exclusions	*Certification
-----------------	------------	------------	------------	------------------	-----------------	----------------

**Schedules**

Schedule A

No entries.

Schedule B

No entries.

Schedule C

No entries.

Other Exclusions

No entries.

To enter data on a schedule, select the applicable schedule and complete all fields. All fields are required.

The schedules should be completed with sufficient identifying information so that each entry can be verified to the budget.

Save each entry as it is completed and it will be added to a list of entries on the page. There is no limit on the number of entries that can be made

Schedule A	<p><b>Schedule C</b></p> <p><b>What this is...</b></p> <p>Exclusions for direct budgetary appropriations for qualified capital projects or equipment that are not financed through debt, grants or state or federal aid.</p> <p><b>How to proceed...</b></p> <p>If your Municipality has such exclusions, you should enter each type of exclusion separately, select the Section 11 paragraph that applies to that exclusion (using the <b>Select Section 11 link</b>), and clearly identify the location of the appropriation in the budget.</p> <p>Enter the appropriate information below and select <b>Save</b>. You can enter multiple occurrences by repeating this process.</p> <div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p><b>Page Number or Budget Code:</b></p> <input type="text" value="A3420.2"/> <p><b>Object or Purpose:</b></p> <input type="text" value="Police car"/> <p><b>Applicable Paragraph of Local Finance Law <a href="#">Section 11</a>:</b></p> <input type="text" value="Passenger Vehicle Other Than School Bus"/> <p><b>Amount:</b></p> <input type="text" value="55,000"/></div>
Schedule B	
Schedule C	
Other Exclusions	
Debt Exclusions	
Certification	
Feedback	
OSC CTL Website	
Print/View Summary	

The Debt Exclusions page will also show the summary of total exclusions from all schedules that is reported on the Tax Limit form.

On any schedule, entries can be changed by using the Edit or Delete links.

Revenue Producing Improvement Debts	Principal	Interest	Total	Action
<b>Bonds</b>				
sewer system improvements	\$250,000	\$25,000	\$275,000	<a href="#">Edit</a> <a href="#">Delete</a>



Other Debt	Principal	Interest	Total	Action
<b>Water - Bonds</b>				
Water tank replacement	\$150,000	\$15,000	\$165,000	<a href="#">Edit</a> <a href="#">Delete</a>
<b>Other Bonds</b>				
General Obligation bonds-capital improvements	\$500,000	\$50,000	\$550,000	<a href="#">Edit</a> <a href="#">Delete</a>

Summary		
Revenue Producing Improvement Debt Total		\$275,000
Revenues Designated for Such Debt Service from Schedule A	-	\$250,000
Revenue Producing Improvement Debt Net Exclusions	=	\$25,000
Other Debt Total	+	\$715,000
Sub Total	=	\$740,000
Revenues Designated by Law for Debt Service from Schedule B	-	\$0
Debt Service Net Exclusions	=	\$740,000
Object/Purpose with a Period of Probable Usefulness from Schedule C	+	\$50,000
Other Exclusions	+	\$0
<b>Total Exclusions</b>	<b>=</b>	<b>\$790,000</b>

Once the form is completed, select Certification from the menu. This can only be accessed by a user assigned the certifier role in the Enrollment section.

If any errors exist in the form or if the appropriate rights in the application have not been assigned to the user, an error message will display.

The form cannot be submitted or certified until all errors are corrected.

Constitutional Tax Limit
Village of Islandia (470442102465)  
Fiscal Year Ending: 12/31/2015

Tax Limit Form Selection  
 Tax Limit Form  
 Schedules  
 Debt Exclusions  
 Certification  
 Feedback  
 OSC CTL Website  
 Print/View Summary

Checklist

\* indicates required elements

*Tax Limit Form 	*Schedule A 	Schedule B 	Schedule C 	Other Exclusions 	Debt Exclusions 	*Certification 
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Certification Process
Form Status: Open

The form contains an error...

When Revenue Producing Improvement Debt entries exist, Schedule A information must also be entered in Schedules.

How to proceed...

Go to the Schedule A page and enter the appropriate information.

The submission and certification process is a 6 step wizard application. The filing will not be considered finalized until all steps are completed.

Each step can be saved and the process restarted at any point in the wizard. A summary of the required steps will indicate all steps and their stage of completion.

Each step can be accessed using the Next buttons in the wizard or the links in the summary.

All entries in the form and schedules can be edited until the final certification step is completed.

### Constitutional Tax Limit

Village of Islandia (470442102465)  
Fiscal Year Ending: 12/31/2015

- Tax Limit Form Selection
- Tax Limit Form
- Schedules
- Debt Exclusions
- Certification
- Feedback
- OSC CTL Website
- Print/View Summary

#### Checklist

\* indicates required elements

*Tax Limit Form	Schedule A	Schedule B	Schedule C	Other Exclusions	Debt Exclusions	*Certification
-----------------	------------	------------	------------	------------------	-----------------	----------------

#### Certification Process

Form Status: **Open**

##### Certifying your Tax Limit form...

This wizard will lead you through the Constitutional Tax Limit Certification process.  
When you have completed all of the necessary steps, you will have provided us the information shown below.

##### How to proceed...

Select **Next** to begin.

##### Certifier

Not Completed. [Go to step 1](#)

##### Pre-Budget Data

Not completed.

Step 1 requires the certifier's title and contact phone number

## Certifier Information

Form Status: **Open**

### Step 1 of 6

Please provide the following information.

<b>Certifier First Name</b>	Amy
<b>Certifier Last Name</b>	McCabe
<b>Certifier Title</b>	<input type="text"/>
<b>Phone Number</b>	<input type="text"/>
<b>Email Address</b>	amccabe@osc.state.ny.us

Cancel

Save and Close

Previous

Next

The Tax Limit form is required to be submitted 10 days prior to budget adoption. Changes can still be made to entries after this step.

This step must be completed even if the form is being submitted late or resubmitted.

## Pre-Budget Submission

Form Status: **Open**

### Step 2 of 6

By checking the box and selecting **Next**, you are submitting your preliminary Tax Limit data.

I hereby submit to OSC, this Constitutional Tax Limit data for the Village of Islandia for the fiscal year ending 12/31/2015, pending budget adoption.

Cancel

Save and Close

Previous

Next

If the question in Step 3 is answered “No” and Next or Save and Close is selected, the user is returned to the Certification summary page.

If the question is answered “Yes” and Next is selected, the wizard proceeds to Step 4.

## Budget Status

Form Status: **Pre-Budget Data Submitted**

### Step 3 of 6

Please provide the following information.

Has your Municipality adopted its budget?

- Yes
- No

### Certification summary page:

#### Certifier

Amy McCabe  
 Clerk-Treasurer  
 (987) 654-3210  
 amccabe@osc.state.ny.us

Go to [step 1](#)

#### Pre-Budget Data

Pre-Budget information successfully submitted to OSC.

Go to [step 2](#)

#### Budget Status

The municipality has not officially adopted its budget.

Go to [step 3](#)

#### Budget Preparation

Not completed.

#### Adopted Budget

Not specified.

#### Tax Limit Data Certification

Not completed.

“No” to Step 4 will return to the summary, “Yes” will take the user to Step 5 to select how the adopted budget is to be submitted.

## Adopted Budget

Form Status: **Pre-Budget Data Submitted**

### Step 4 of 6

You are required to submit a certified copy of your adopted budget within 30 days of adoption.

Are you prepared to provide a certified copy of your Municipality's budget to OSC?

- Yes
- No

Cancel

Save and Close

Previous

Next

When a submission method is selected, the window expands to provide additional information for that submission type.

DO NOT use a general website link for a URL submission. It must be a direct link to the ADOPTED budget document.

## Adopted Budget Submission

Form Status: **Pre-Budget Data Submitted**

### Step 5 of 6

Select how you will provide a copy of your budget.

- A copy of the adopted budget will be mailed/emailed to the Comptroller's Office.
- A copy of the adopted budget can be accessed at the following URL:
- Upload an electronic copy of the adopted budget:

Browse...

Save

Cancel

Save and Close

Previous

Next



Once Step 6 has been completed, the form cannot be edited unless it is put into Resubmit status.

If the user is the CFO or designated by the CFO to certify the filing, the first option in the Certification should be selected.

If a certification by a municipal officer other than the CFO (i.e. Clerk) is attached to the copy of the adopted budget submitted, select the second option.

Tax Limit Form Selection

Tax Limit Form

Schedules

Debt Exclusions

Certification

Feedback

OSC CTL Website

Print/View Summary

▼ Checklist

\* indicates required elements

*Tax Limit Form 	*Schedule A 	Schedule B 	Schedule C 	Other Exclusions	*Debt Exclusions 	*Certification
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### Tax Limit Certification

Form Status: Pre-Budget Data Submitted

**Step 6 of 6**

By checking the box and selecting **Next**, you are indicating that, as the Chief Financial Officer or the CFO's authorized designee, the Tax Limit data hereby submitted is accurate, to the best of your knowledge.

I certify that the copy of the adopted budget provided to OSC is a true and correct copy of the budget and is certified by:

- Myself as the Chief Financial Officer or designee.
- Another Municipal Officer as shown by a certification attached to the budget.

Cancel
Previous
Next

Once the form is submitted, budget submission type selected and certified, OSC will review the submission and either accept and close the submission or request a resubmission with updated information. An email will be generated to the certifier to inform the municipality of the change in status of the form.

Tax Limit Form Selection

Tax Limit Form

Schedules

Debt Exclusions

Certification

Feedback

OSC CTL Website

Print/View Summary

▼

Checklist

\* indicates required elements

*Tax Limit Form 	*Schedule A 	Schedule B 	Schedule C 	Other Exclusions	*Debt Exclusions 	*Certification 
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### Certification Process

Form Status: Certified

**Congratulations!**

The Constitutional Tax Limit submission is complete.

No further action is necessary.

**If you need to make changes...**

In order to modify the information on this form, you must contact the OSC Monitoring and Analysis Unit at 866-321-8503 or email [LGSAMonitoring@osc.state.ny.us](mailto:LGSAMonitoring@osc.state.ny.us) to have the form put into **Resubmit** status.