

User Guide
OASYS ePortal



Florida Department of Revenue
Property Tax Oversight
April 2022

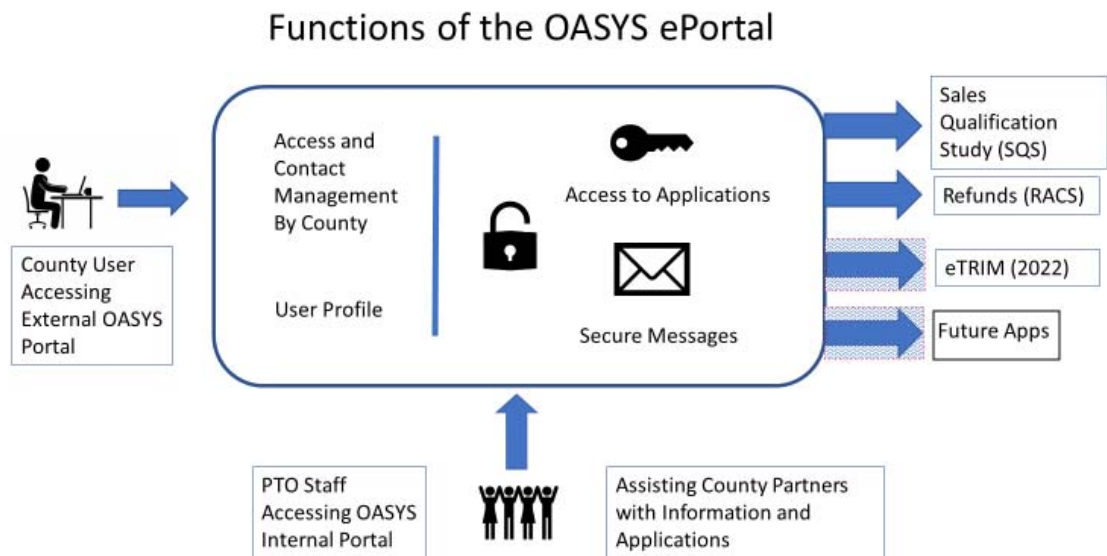
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1. Introduction

The OASYS ePortal is Property Tax Oversight's (PTO) new online workspace and platform for communication with county offices, including property appraisers and tax collectors. OASYS ePortal is an abbreviation for: **O**versight and **A**ssistance **S**ystem electronic portal.

The purpose of the OASYS ePortal is to provide a single internet location where elected officials and their staffs can access PTO applications and important messages. The general functions of the OASYS ePortal are illustrated below.



The OASYS ePortal enables users to:

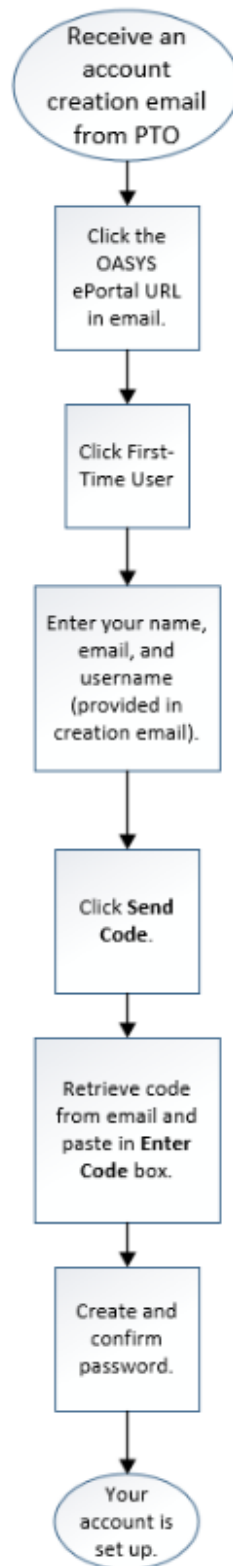
- Access all PTO applications with a single sign-on.
- Receive and store messages from PTO in a central, secure location.

This user guide is intended to help OASYS ePortal users understand how to subscribe to, view, and manage messages received in the OASYS ePortal and how to access applications. Details for managing contacts and establishing user access is also provided. Functionality and features of each OASYS ePortal application are provided in separate user guides available within each application.

The best web browser to use with the OASYS ePortal is Google Chrome.

2. Initial Account Setup

The following diagram provides an overview of the account setup process.



- 2.1** You will receive an account creation email from PTO. This email will notify you that an OASYS ePortal account has been opened for you. The email will also provide instructions on how to finish setting up the account.

Jane Rinehart,

An account has been created for you in the Florida Department of Revenue (Department) Property Tax Oversight (PTO) ePortal by PTO. To complete your account creation, please complete the following steps in order.

1. Verify the spelling of the name (Jane Rinehart) on your account. If the spelling is not correct, please reach out to PTO (SD-PTO@floridarevenue.com) to have this corrected before proceeding with account setup.
2. Browse to <http://ptportal.floridarevenue.com>
3. Click on the "First Time User" link under the Login button.
4. When prompted, enter the email address where you received the email and your unique username (tyrpa-rinehartj).

You will then follow the prompts to create a password so that you can gain access to the PTO ePortal.

***Note: This message was sent from an unmonitored email address. Please do NOT reply to this message.

- 2.2** Browse to <https://ptportal.floridarevenue.com> then click the **First-Time User** link under the **Login** button.

The screenshot shows the Florida Department of Revenue's OASYS ePortal website. At the top, there is a navigation bar with the following links: HOME, CHILD SUPPORT, PROPERTY TAX OVERSIGHT, GENERAL TAX, and CONTACT. The main content area is divided into several sections:

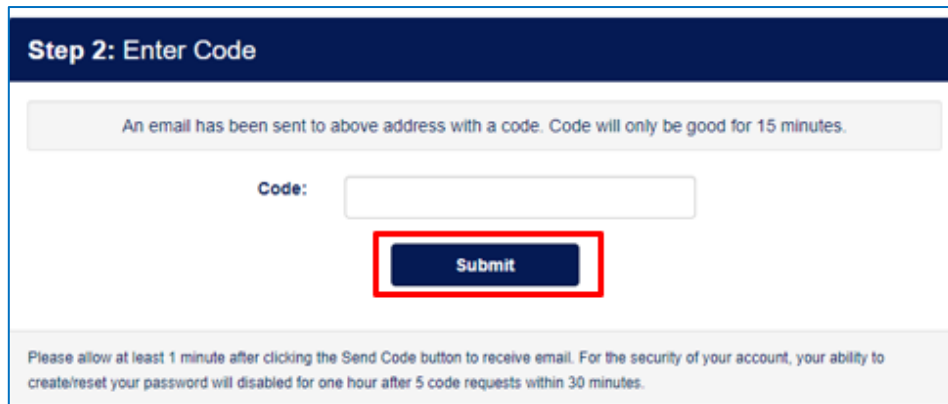
- Welcome to Property Tax Oversight's OASYS ePortal:** A large graphic with a palm tree logo and the text "OASYS is an abbreviation for Oversight and Assistance System; ePortal is an abbreviation of electronic portal."
- Login Section:** A dark blue box containing a "Login" button, a "First-Time User" link (circled in red), and links for "Forgot Username" and "Forgot Password".
- Important Information:** A green box stating: "The OASYS ePortal has been rolled out to county Property Appraiser and Tax Collector office staff. It will be rolled out to Taxing Authorities and Clerks of Court in the future."
- Upcoming Maintenance:** A red box stating: "The OASYS ePortal may be down for maintenance each Sunday between 4-10pm."

- 2.3** You will arrive at the **Welcome to the OASYS ePortal** screen. Here, you will enter the following fields under **Step 1: Enter Email and Username**.
- Enter your **First Name (a)**. Make sure that the spelling of your name is correct as this cannot be undone after an account is created.
 - Enter your **Last Name (b)**. Make sure that the spelling of your name is correct as this cannot be undone after an account is created.
 - Enter your **Email (c)**. This can be modified later if needed.
 - Enter the **Username (d)** that was provided for you in your account creation email.

The screenshot shows the 'Welcome to the OASYS ePortal' interface. At the top, there is a teal header with the text 'Welcome to the OASYS ePortal'. Below this is a red banner with the text 'Step 1: Enter Email & Username'. Underneath the banner is a grey box with the text 'First-Time Users: Username was provided in your account creation email.'. The main form area contains four input fields, each with a red letter label (a, b, c, d) and a 'Send Code' button. The labels are: 'a First Name:', 'b Last Name:', 'c Email:', and 'd Username:'. Each input field has a small 'As spelled in account creation email' note above it. The 'Send Code' button is highlighted with a red box.

- 2.4** After entering the necessary information, click **Send Code**. If the data entered is not found in the system, you will receive a message to review and re-enter your credentials. This message should also include a contact for help if you continue to receive this message. If the data entered is found in the system, you will receive an email with a **Verification Code**.

- 2.5 Enter this **Verification Code** in the box titled **Step 2: Enter Code**. Then, click **Submit**.



The screenshot shows a web form titled "Step 2: Enter Code". At the top, a message states: "An email has been sent to above address with a code. Code will only be good for 15 minutes." Below this is a text input field labeled "Code:". A dark blue button labeled "Submit" is positioned below the input field and is highlighted with a red rectangular border. At the bottom of the form, a smaller message reads: "Please allow at least 1 minute after clicking the Send Code button to receive email. For the security of your account, your ability to create/reset your password will disabled for one hour after 5 code requests within 30 minutes."

- 2.6 You will arrive at **Step 3: Create Password** where you will create and confirm your password. After confirming your password, click **Update Password**.

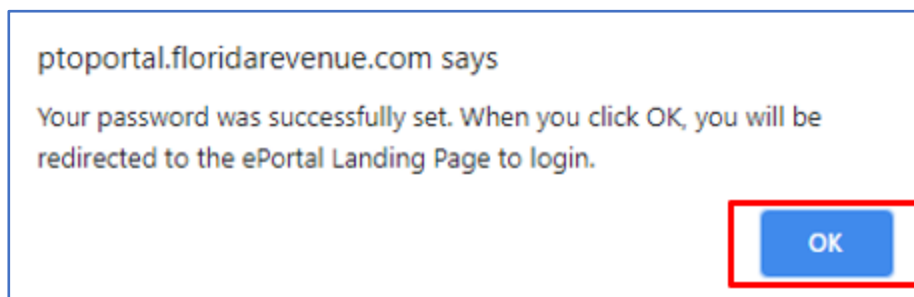


The screenshot shows a web form titled "Step 3: Create Password". It lists "Password requirements:" which include:

- 3 of the 4 character types
 - Lowercase character (a-z)
 - Uppercase character (A-Z)
 - Number (0-9)
 - Symbol (@ # \$ % ^ & * - _ ! = ?)
- 8-64 characters

Below the requirements are two text input fields: "Password:" and "Confirm Password:". Each field has a small circular icon on the right side. A dark blue button labeled "Update Password" is located below the "Confirm Password" field and is highlighted with a red rectangular border.

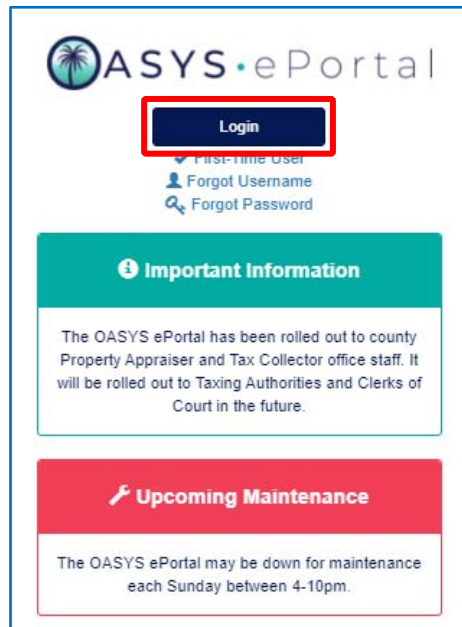
- 2.7 You will receive a confirmation message. Click **OK**. You are now finished setting up your account.



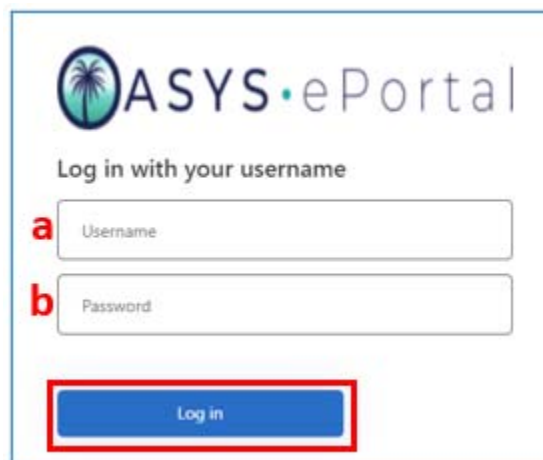
The screenshot shows a confirmation message box. The text reads: "ptportal.floridarevenue.com says Your password was successfully set. When you click OK, you will be redirected to the ePortal Landing Page to login." A blue button labeled "OK" is located at the bottom right of the message box and is highlighted with a red rectangular border.

3. Login

- 3.1 Browse to <https://ptportal.floridarevenue.com> and click the **Login** button.

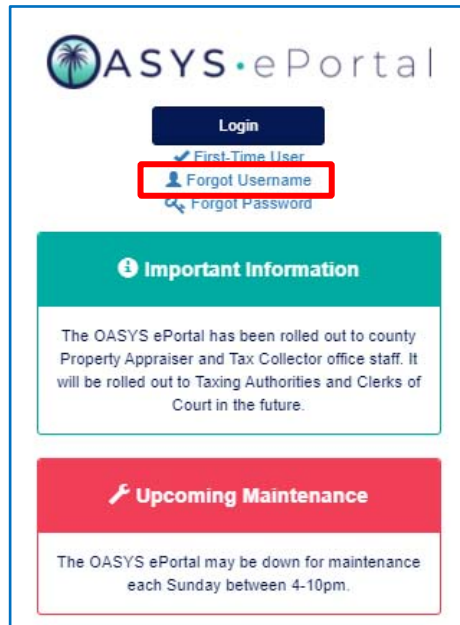


- 3.2 You will arrive at the Florida Department of Revenue sign in screen. Here, you will enter the following information:
- Enter the **Username (a)** that was provided to you in the account creation email mentioned in the **Initial Account Setup** section of this document.
 - Enter the **Password (b)** that you created.
 - After entering the necessary information, click **Log in**. You will arrive at your **OASYS ePortal Dashboard**, which will be discussed in the **Dashboard (Home)** section of this document.

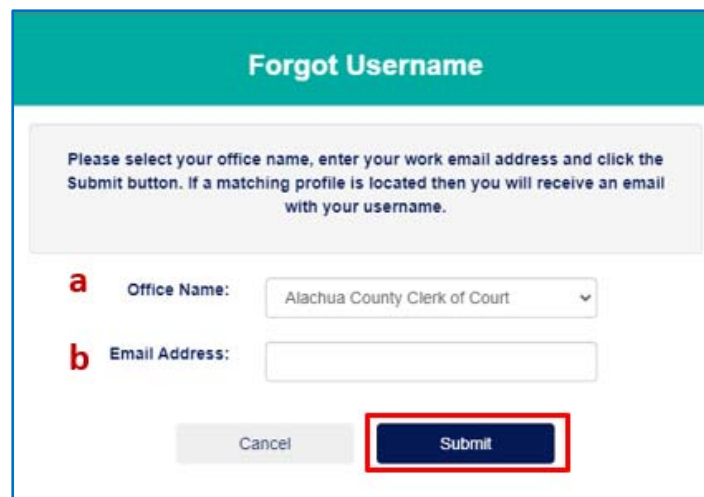


4. Forgot Username

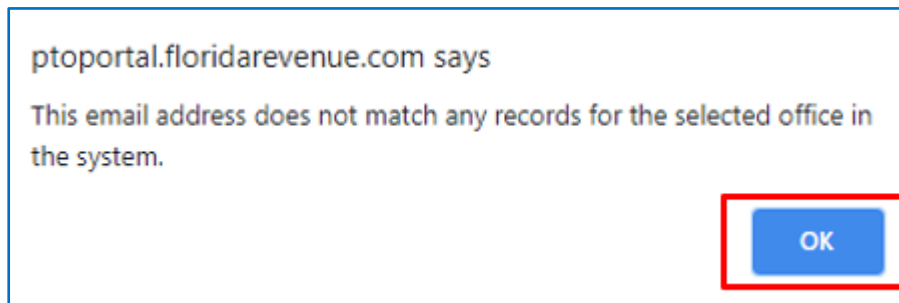
- 4.1 Browse to <https://ptoportal.floridarevenue.com> and Click **Forgot Username**.



- 4.2 You will arrive at the **Forgot Username** screen. Here, you will enter or select the following information:
- Select the name of your office from the **Office Name (a)** dropdown list.
 - Enter the **Email Address (b)** associated with your OASYS ePortal account.
 - After selecting or entering the necessary information, click **Submit**. If the system locates a matching profile, you will receive an email with your **Username**.

The image shows the 'Forgot Username' screen. At the top, there is a teal header with the text 'Forgot Username'. Below the header, there is a grey box containing the following text: 'Please select your office name, enter your work email address and click the Submit button. If a matching profile is located then you will receive an email with your username.' Below this text, there are two input fields. The first is labeled 'a Office Name:' and has a dropdown menu with 'Alachua County Clerk of Court' selected. The second is labeled 'b Email Address:' and is an empty text input field. At the bottom of the form, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a red rectangular box.

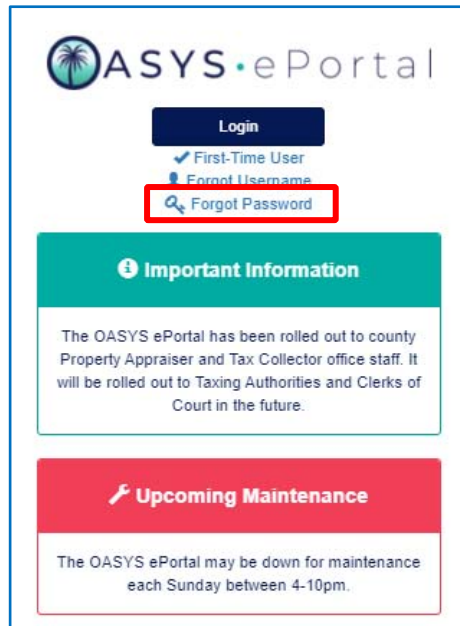
- 4.3 If the system does not locate a matching profile, you will receive this message:



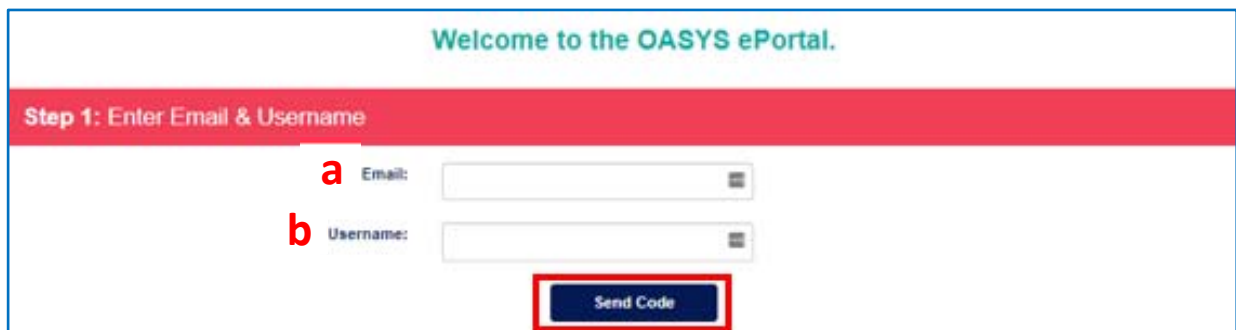
- 4.4 Click **OK**. You may reach out to the **Contact Manager** in your office or send an email to pto-oasys@floridarevenue.com for additional assistance.

5. Forgot Password

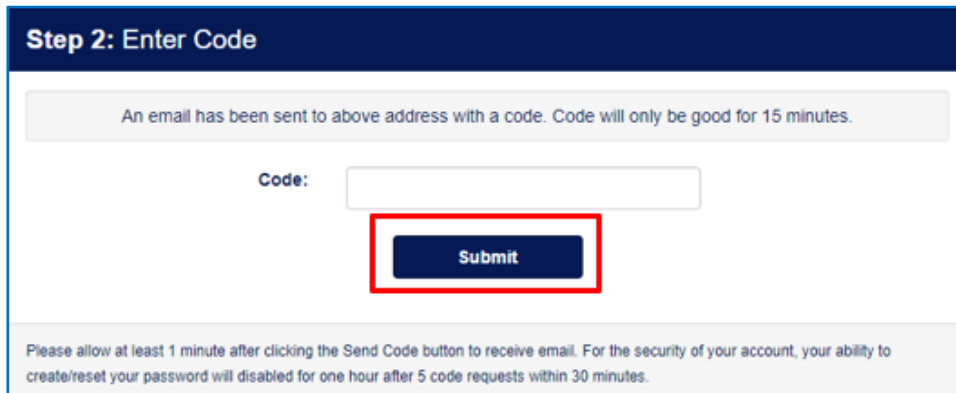
- 5.1 Browse to <https://ptportal.floridarevenue.com> and click **Forgot Password**.



- 5.2 You will arrive at the **Welcome to the OASYS ePortal** screen. Enter the following fields under **Step 1: Enter Email & Username**:
- Enter the **Email (a)** address that is associated with your OASYS ePortal account.
 - Enter the **Username (b)** that was provided for you in your account creation email.
 - Click **Send Code**.
 - You will receive an email with a **Verification Code**.

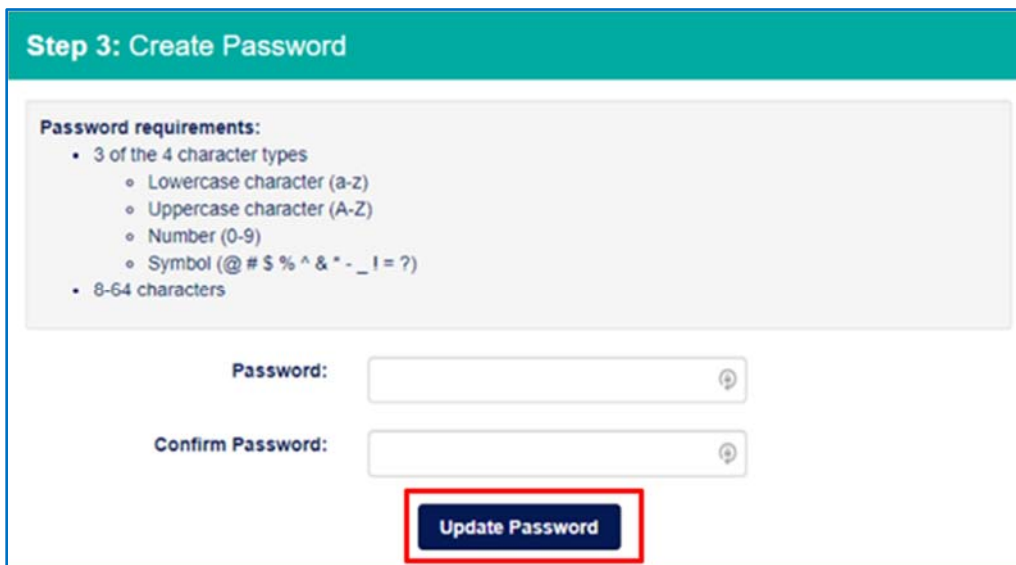


- 5.3 Enter the **Verification Code** under **Step 2: Enter Code**. Then, click **Submit**.



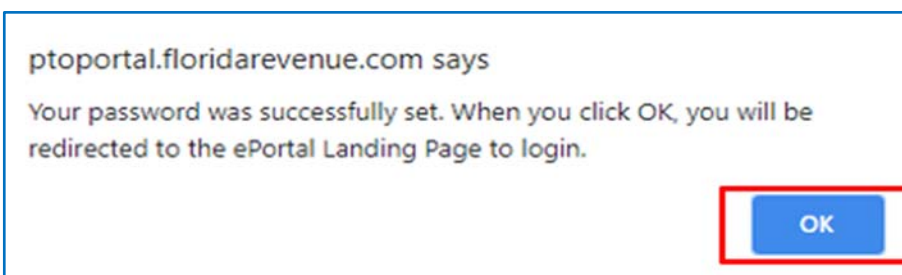
The screenshot shows a web form titled "Step 2: Enter Code". At the top, a message states: "An email has been sent to above address with a code. Code will only be good for 15 minutes." Below this is a text input field labeled "Code:". A dark blue button labeled "Submit" is positioned below the input field and is highlighted with a red rectangular border. At the bottom of the form, a note reads: "Please allow at least 1 minute after clicking the Send Code button to receive email. For the security of your account, your ability to create/reset your password will be disabled for one hour after 5 code requests within 30 minutes."

- 5.4 You will arrive at **Step 3: Create Password**, where you will create and confirm your password. After confirming your password, click **Update Password**.



The screenshot shows a web form titled "Step 3: Create Password". It lists "Password requirements:" which include: 3 of the 4 character types (Lowercase character (a-z), Uppercase character (A-Z), Number (0-9), Symbol (@ # \$ % ^ & * - _ ! = ?)), and 8-64 characters. Below the requirements are two text input fields: "Password:" and "Confirm Password:", each with a toggle icon on the right. A dark blue button labeled "Update Password" is located below the second input field and is highlighted with a red rectangular border.

- 5.5 You will receive a confirmation message. Click **OK**. You are now finished updating your password.



The screenshot shows a confirmation message from "ptoportal.floridarevenue.com" stating: "Your password was successfully set. When you click OK, you will be redirected to the ePortal Landing Page to login." A blue button labeled "OK" is located at the bottom right of the message and is highlighted with a red rectangular border.

6. Dashboard (Home)

- 6.1** When you successfully log in, you will arrive at your **OASYS ePortal Dashboard**. Here, you will see several features.
- The **Messages (a)** feature alerts you to messages from PTO. Detailed information about **Messages** is provided in the **Accessing OASYS ePortal Messages** section of this user guide.
 - The **Your Applications (b)** feature contains applications and functionality to which you currently have access. A brief description of **Your Applications** is provided in the **Accessing OASYS ePortal Applications** section of this user guide. Detailed information about each application is provided in the application’s user guide (found under the resources tab within the application).
 - The **Your Important Dates (c)** feature displays dates that are important to your office type as well as any links to applicable Florida Statutes. This feature shows important dates for the next 30 days. Detailed information on **Your Important Dates** is provided in the **Important Dates** section of this user guide.
 - The **Contact PTO (d)** feature contains links to key contacts within PTO to reach out to with specific questions.
 - The **My Office (e)** feature contains information about the office in which you work.
 - The **References (f)** feature contains links to information that are closely linked with tasks you might perform for PTO.

The screenshot shows the OASYS ePortal dashboard. At the top is the logo and a browser recommendation. Below are several sections: 'Contact PTO' (d), 'My Office' (e), 'References' (f), a 'Messages' notification (a), 'Your Applications' (b) with sub-sections like 'Refunds and Certificates System', 'Access Management', and 'Contact Management', and 'Your Important Dates' (c) which includes a table of dates and events.

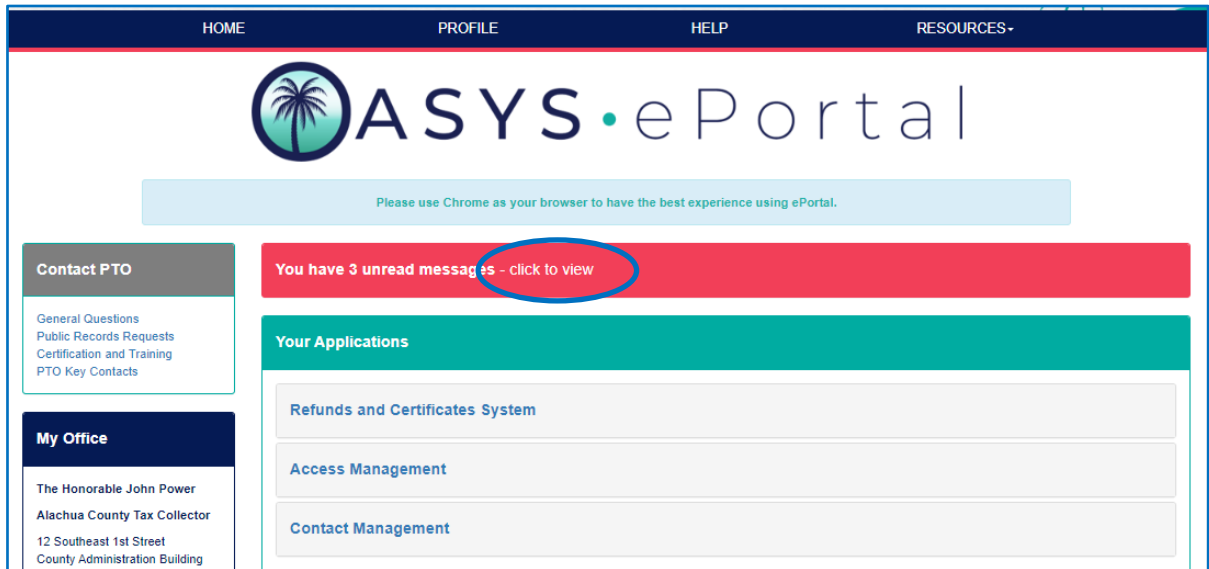
Date	Responsible Party	Item	References
April 24	Collector	Give information to mortgagee or lien holder of personal property if asked for by May 1 of last year (before April 25).	
April 29	Collector	Prepare warrants for levy on and seizure of tangible personal property that became delinquent last year (before April 30).	
April 30	Taxpayer	File initial application to prepay taxes by installment for the current year. After receiving an application for prepayment, the collector will send the taxpayer a quarterly tax notice.	
April 30	Collector	Send a second tax notice to taxpayers whose taxes have not been remitted.	

- 6.2** Several useful tabs are available in the blue ribbon at the top of your **OASYS ePortal Dashboard**. The ribbon, with the same four tabs, appears on all screens within the **OASYS ePortal**. The function of each tab is described below:
- The **HOME (a)** tab returns you to your **OASYS ePortal Dashboard** from other screens with the portal.
 - The **PROFILE (b)** tab brings you to your user profile. Detailed information about the **Profile** page is provided in the **Accessing OASYS ePortal Applications** section of this document.
 - The **HELP (c)** tab brings you to the **Report Technical Problems** screen. Detailed information about this screen is provided in the **Reporting Technical Problems** section of this document.
 - The **RESOURCES (d)** tab provides useful links, including a link to this user guide.



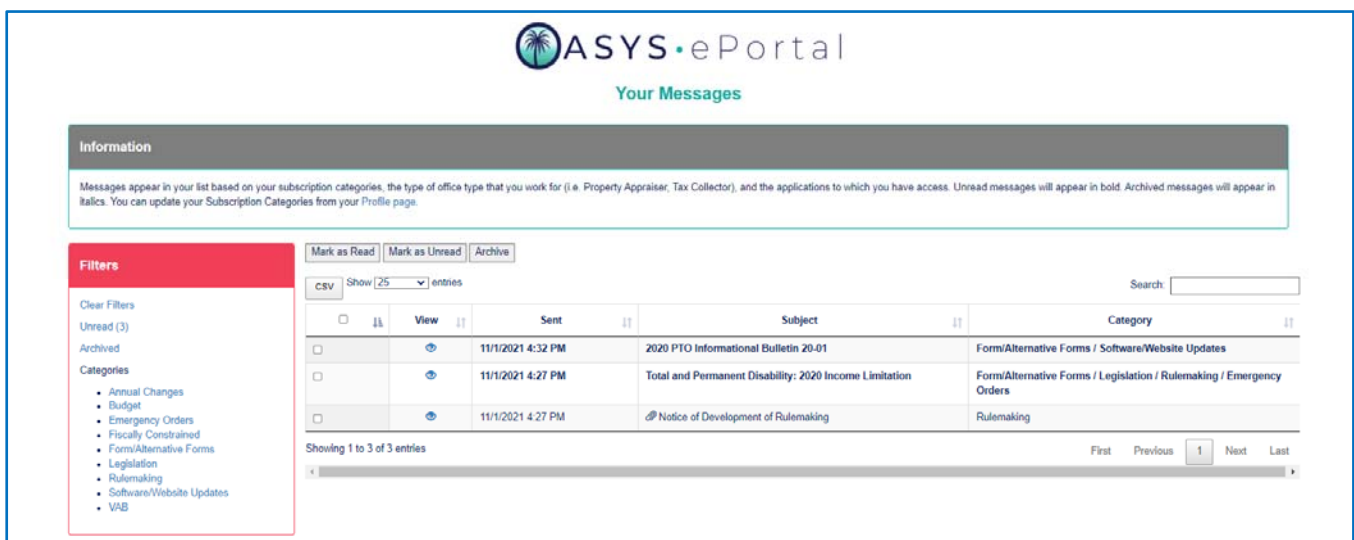
7. Accessing OASYS ePortal Messages

- 7.1 You can access your messages from your **OASYS ePortal Dashboard**. Click the **Click to View** link in the **Messages** section to access your messages. You will arrive at the **Your Messages** screen.







- 7.2 Messages will appear in your list based on your subscription categories, the type of office that you work for (i.e., Property Appraiser, Tax Collector, etc.), and the applications to which you have access. As mentioned in the **Manage Subscription Categories** section of this document, you can update your subscriptions on your **User Profile**.

On the **Your Messages** screen, you will notice your inbox in a data table with several columns. Note that you can export your inbox to CSV and can sort on any column.



7.3 The **Your Messages** screen features several action links and data for each message row in the data table:

- The **Select (a)** column allows you to select an individual message. Click the toggle box () to select the message shown on that line of data.
- Click the  icon in the **View (b)** column to pull the message up in a pop-up window.
- The **Sent (c)** column shows the date and time that the message was sent. Messages are automatically sorted newest to oldest.
- The **Subject (d)** column lists the subject line or title of the message.
- The **Category (e)** column shows the category with which the message was tagged.

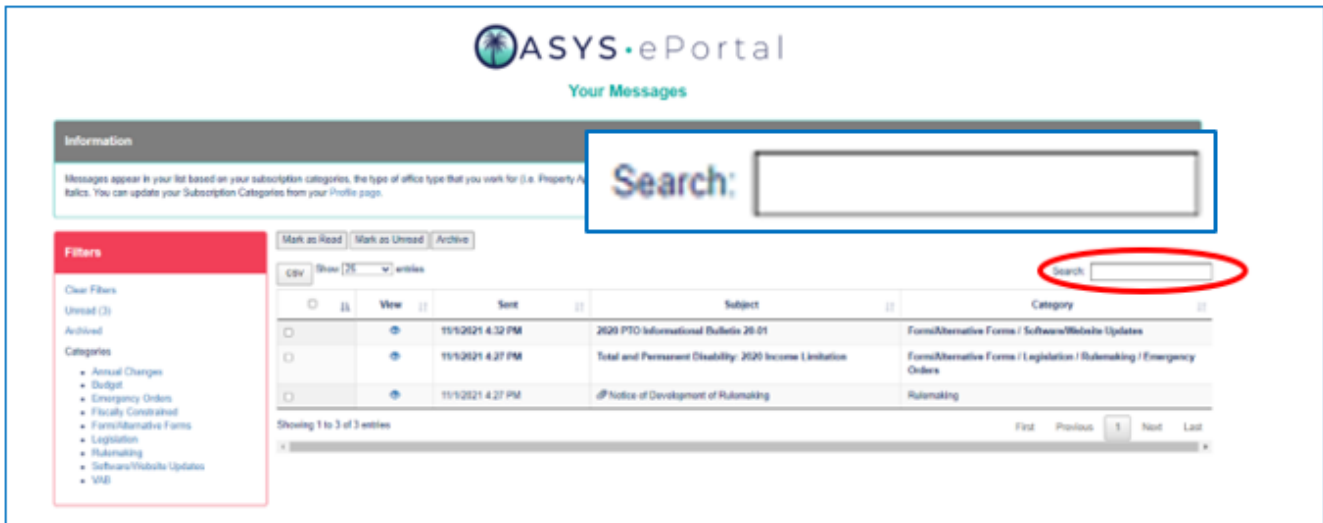
a <input type="checkbox"/>	b View	c Sent	d Subject	e Category
<input type="checkbox"/>		6/9/2021 2:25 PM	Tax Roll Approval 6/9 - CM	Tax Roll Approval
<input type="checkbox"/>		6/9/2021 2:11 PM	Budget Test 6/9 - CM	Budget
<input type="checkbox"/>		6/9/2021 12:55 PM	Legislation Test 6/9 - CM	Legislation

Showing 1 to 3 of 3 entries First Previous

7.4 Notice the three buttons above the inbox.

- After selecting one or multiple messages, click **Mark as Read (a)** to indicate that you have read the message. Messages that are marked as read will appear without bold text.
- After selecting one or multiple messages, click **Mark as Unread (b)** to indicate that the message is unread. Messages that are marked as unread will appear in **bold** text.
- After selecting one or multiple messages, click **Archive (c)** to archive the message. This will send the message(s) to your **Archived Inbox**. Messages that are archived will appear in *italics*.


7.5 You may also search the message table contents by entering any word, phrase, or number into the **Search** box above the inbox data table.



7.6 By clicking the icon in the **View** column next to a message, you will arrive at the **View Message** pop-up window. After reading the message, you can click one of two buttons.

- Click **Mark as Read (a)** if you wish to indicate that the message has been read upon closing the message window. This option will not be available if you are reading a message that is already marked as read.
- Click **Close Message (b)** if you wish to close the message without indicating that the message has been read. This is the only option available for messages that have already been marked as read.



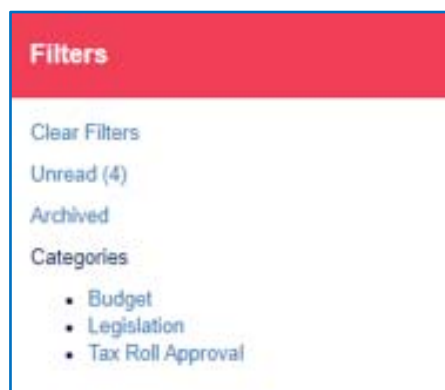
7.7 Messages that contain an attachment will have the  **Paperclip** icon next to the **Subject** of the message like the message below.

<input type="checkbox"/>		8/16/2021 8:18 AM	 2020 Complete Submission and Roll Evaluation Standards	Annual Changes / Tax Roll Approval
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- 7.8** When viewing a message with an attachment, right click on the attachment link to open the attachment documents in a new window tab as shown in the image below.



- 7.9** The **Filters** box next to the inbox data table allows you to apply filters to your inbox.
- The filters under **Categories** are populated based on the contents of each user’s messages. This means that you will not see a category filter for a message category that is not present in your inbox.
 - You can access your archived messages by clicking the **Archived** link in the **Filters** box.
 - You can also clear your filters by clicking the **Clear Filters** link in the **Filters** box.



7.10 Important features of OASYS ePortal messages to note:

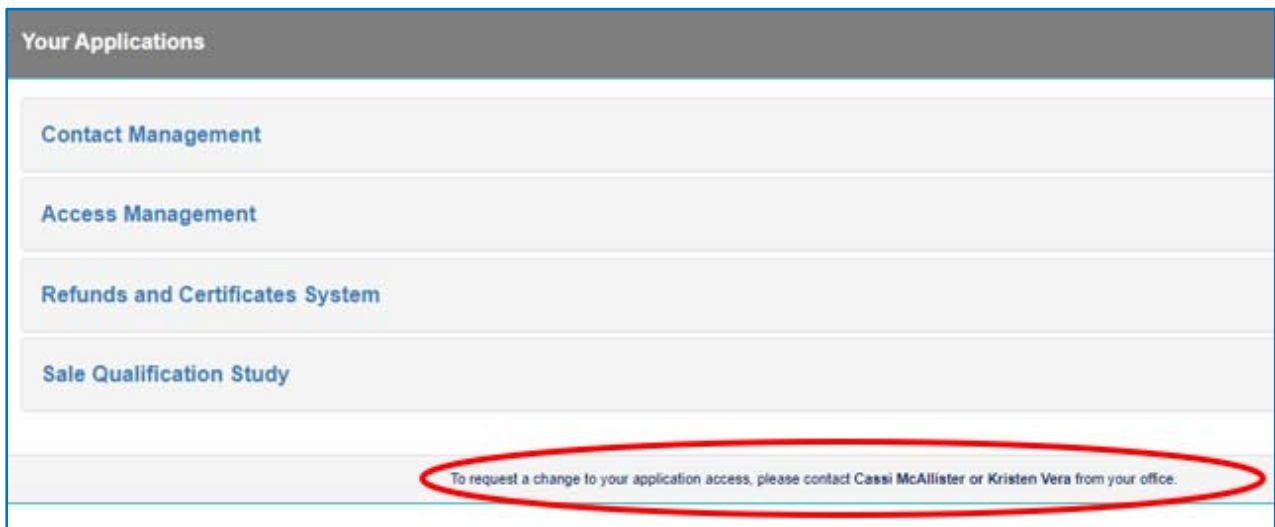
- Messages within the OASYS ePortal are one-way. This means that PTO can send messages to county users through the OASYS ePortal, but county users cannot reply to these messages through the OASYS ePortal.
- Messages will also appear in the county user's email inbox associated with their OASYS ePortal account. This means it is not necessary to log into your OASYS ePortal to view messages sent from the portal.
- Depending on the message content, the message may contain specific information for reply emails outside of the OASYS ePortal.

8. Accessing OASYS ePortal Applications

- 8.1 You can access PTO applications from your **OASYS ePortal Dashboard**. All applications for which you are an authorized user will be listed in the **Your Applications** box on your dashboard.
- 8.2 To access an application, click the application name. You will arrive at the home page for that application and will leave the **OASYS ePortal**.

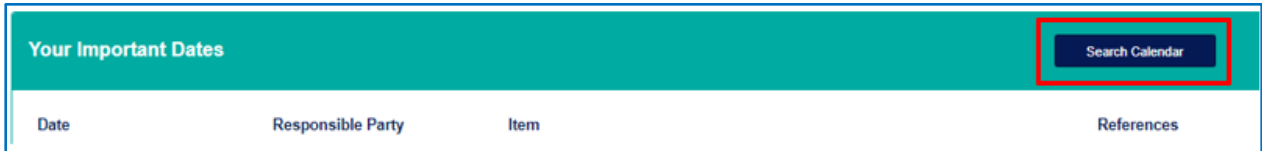


- 8.3 You will also see a message at the bottom of the **Your Applications** box informing you to contact the Access Manager for your office to request a change to your application access.



9. Important Dates

- 9.1** The **Your Important Dates** feature on your **OASYS ePortal Dashboard** will display important dates for your office type that occur within the next 30 days.
- 9.2** Click **Search Calendar** to access and view a full list of important dates.



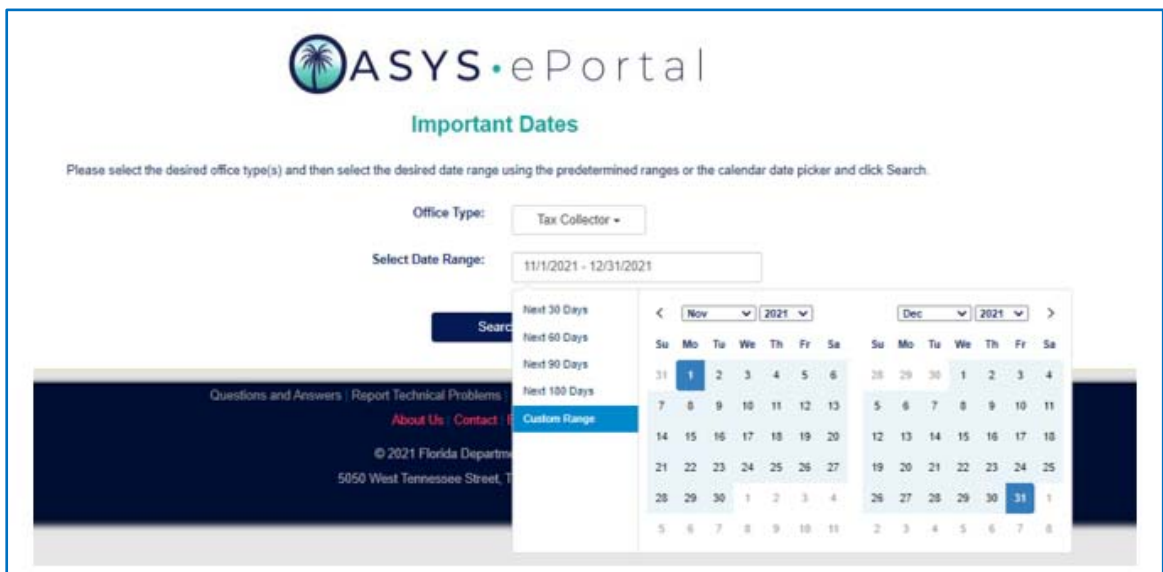
- 9.3** You will arrive at the **Important Dates** screen. Here, you will select the following fields:
- Use the **Office Type (a)** dropdown list to select the type of office for which you wish to see important dates.
 - Use the **Select Date Range (b)** calendar to select the beginning and end date range for which you wish to see important dates.
 - After selecting the necessary information, click **Search**.

The screenshot displays the 'Important Dates' search interface. At the top, the title 'Important Dates' is shown in teal. Below it, a instruction reads: 'Please select the desired office type(s) and then select the desired date range using the predetermined ranges or the calendar date picker and click Search.' The form contains two main input fields: 'a Office Type:' with a dropdown menu currently set to 'None selected -', and 'b Select Date Range:' with a text input field containing 'Select Date Range'. A dark blue 'Search' button is located at the bottom center and is highlighted with a red rectangular box.

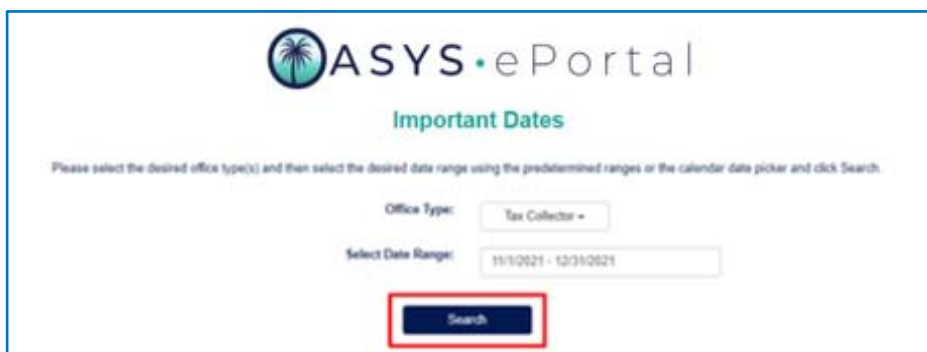
- 9.4 For example, if you wish to see important dates for tax collectors for November 1 through December 31, 2021, you will first select **Tax Collector** in the **Office Type** dropdown list.



Next click in the **Select Date Range** box to open the calendar tool. Select **November 1, 2021** as the start date and **December 31, 2021** as the end date.



This will populate the **Select Date Range** box with the appropriate date range selected. After selecting the necessary information, click **Search**.



- 9.5** Once **Search** is clicked, search results will be displayed in a table with the following fields:
- The **Date (a)** column displays the actual deadline/date for the important date.
 - The **Office Type (b)** column displays the office to which this important date applies.
 - The **Responsible Party (c)** column displays the party responsible for performing an action by a specific date.
 - The **Item (d)** column describes the important date in detail.
 - The **Florida Statute(s) (e)** column lists any applicable Florida Statute(s) related to that important date.
 - The **References (f)** column contains links to information relevant to that important date.

a Date	b Office Type	c Responsible Party	d Item	e Florida Statute(s)	f References
November 1	Tax Collector	Taxpayer	Taxes are due and payable November 1 or when the tax collector receives the roll.	F.S. 1234	
November 1	Tax Collector	Taxpayer	Deferred taxes and interest for previous years for homestead, affordable rental housing, and recreational and commercial working waterfront property are due (November 1 or date the change occurs) if there is a change in use and the owner is not entitled to the exemption. Lapse in the required insurance. Change in ownership.	F.S. 1234	
November 1	Tax Collector	Collector	Notify each property owner granted tax deferral of the accumulated sum of deferred taxes, non-ad valorem assessments, and outstanding interest.	F.S. 1234	
November 1	Tax Collector	Collector	Notice in a local newspaper when the tax roll is open for collection (November 1 or as soon as the tax roll is open).	F.S. 1234	
November 1 - 28	Tax Collector	Collector	Send notice of taxes, non-ad valorem assessments, and right to prepay to taxpayers by 20 working days after receiving the certified roll.	F.S. 1234	
November 1 - 30	Tax Collector	Collector	Report amounts to the board of county commissioners and the school board if you received advances or commissions. Make any needed adjustments.	F.S. 1234	
November 1 - 30	Tax Collector	Collector	Apply a 4% discount on taxes paid in November or within 30 days after the tax collector mailed the tax notice.	F.S. 1234	
December 1	Tax Collector	Appraiser	Properly appraiser certify circumstances to tax collector if the roll cannot be certified in time for taxpayers to pay before January 1.	F.S. 1234	
December 1	Tax Collector	Collector	If the tax roll will be late, notice in the newspaper that the tax roll will not be certified by January 1 and estimated tax payments may be made through December 31.	F.S. 1234	
December 15	Tax Collector	Collector	Send the Department of Revenue a report on the non-ad valorem assessment rolls and a copy of each roll as prescribed.	F.S. 1234	
December 1 - 31	Tax Collector	Collector	Apply a 2% discount on ad valorem taxes paid in December.	F.S. 1234	
December 31	Tax Collector	Taxpayer	Pay 3rd installment, 1/3 of current year estimated taxes, plus 1/3 of any adjustment for a 2% discount.	F.S. 1234	
December 1 - January 31	Tax Collector	Collector	If the tax roll was certified late and taxpayers paid estimated taxes, prepare a tax notice-receipt for all payers of estimated taxes and refund any overpayment over \$10 when the tax collector receives the certified tax roll.	F.S. 1524	

- 9.6** There are several additional features for search results:

- Every column can be sorted ascending or descending by clicking the respective **Arrow** to the right of the column heading.
- The table results can be filtered by entering text in the **Filter** text box (upper right corner of the table results).
- The number of entries can be modified by selecting the preferred count in the **Show Entries** menu (near upper left corner of the table results).
- The resulting table can be exported to as a comma delimited file by clicking the **CSV** action button (far upper left corner of the table results).

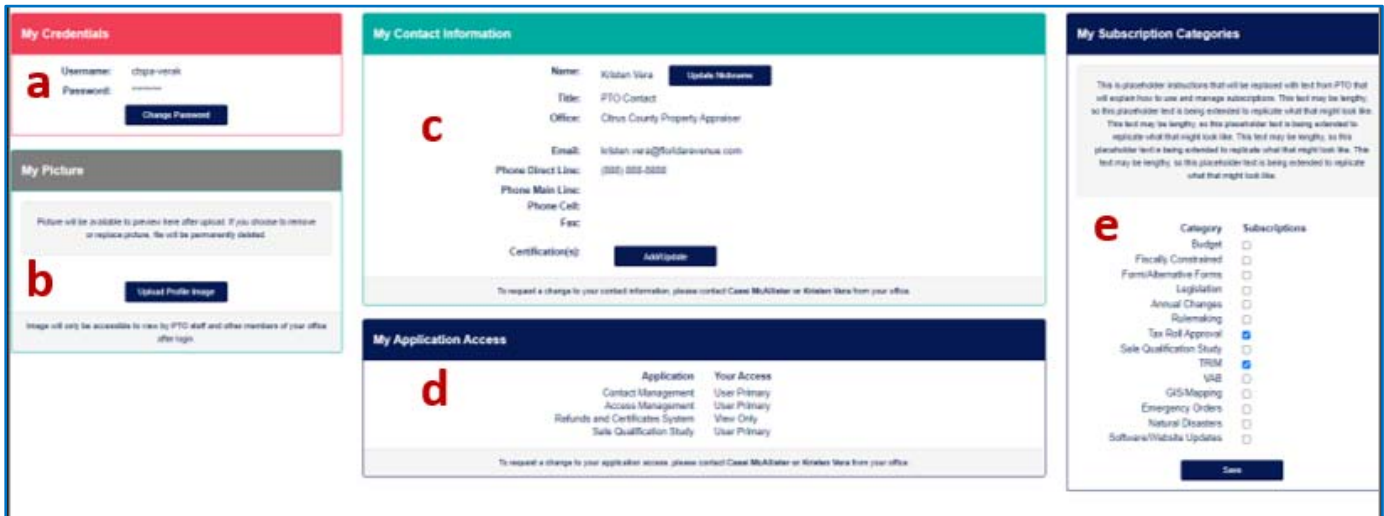
10. User Profile

10.1 From your **OASYS ePortal Dashboard** click the **PROFILE** tab.



10.2 You will arrive at your **User Profile**. Here, you will see several features.

- The **My Credentials (a)** feature allows you to change your password by clicking **Change Password**.
- The **My Picture (b)** feature allows you to upload a profile image by click **Upload Profile Image**.
- The **My Contact Information (c)** feature allows you to change select pieces of your contact information. You can click **Update Nickname** to update your nickname. You can also click **Add/Update** next to **Certification(s)** to modify any certifications that you hold.
- The **My Application Access (d)** feature allows you to view the level of access that you have for PTO applications and/or office functionalities.
- The **My Subscription Categories (e)** feature allows you to manage the types of communications you receive from PTO. This is discussed in further detail in the **Manage Subscription Categories** section of this document.



11. Manage Subscription Categories

- 11.1 From the **User Profile** screen, you can also manage your subscription categories under **My Subscription Categories**.
- 11.2 Select/unselect the checkboxes as appropriate and click **Save**.

My Subscription Categories

You choose which types of messages to receive from PTO by subscribing to the subjects you prefer. The categories below list the topics of routine messages that may be of interest to you and your office.

To receive messages about any category, select the checkbox next to it and press **Save**. Choose as many categories as you like. To unsubscribe from a category, de-select the checkbox for that category and press **Save**.

Category	Subscriptions
Budget	<input checked="" type="checkbox"/>
Fiscally Constrained	<input checked="" type="checkbox"/>
Form/Alternative	<input type="checkbox"/>
Forms	<input type="checkbox"/>
Legislation	<input checked="" type="checkbox"/>
Annual Changes	<input type="checkbox"/>
Rulemaking	<input checked="" type="checkbox"/>
Tax Roll Approval	<input checked="" type="checkbox"/>
Sale Qualification	<input type="checkbox"/>
Study	<input type="checkbox"/>
TRIM	<input checked="" type="checkbox"/>
VAB	<input type="checkbox"/>
GIS/Mapping	<input checked="" type="checkbox"/>
Emergency Orders	<input type="checkbox"/>
Natural Disasters	<input type="checkbox"/>
Software/Website	<input type="checkbox"/>
Updates	<input type="checkbox"/>

Save

- 11.3 This will control what messages you receive.

12. Reporting Technical Problems

12.1 From your **OASYS ePortal Dashboard** click the **HELP** tab.

HOME

PROFILE

HELP

RESOURCES ▾

12.2 You will arrive at the **Report Technical Problems** screen (shown on the next page). Here, you will see many fields.

- Input the first and last name of the person experiencing the technical problem in the **Name (a)** field.
- Input the portal username of the person experiencing the technical problem in the **PTO Portal Username (b)** field.
- Input the email address of the person experiencing the technical problem in the **Email (c)** field.
- Input the direct phone line of the person experiencing the technical problem in the **Phone Direct Line (d)** field.
- Input an additional phone number for the person experiencing the technical problem in the **Other Phone (e)** field if applicable.
- The **Date (f)** field should be automatically populated with the current date.
- The **Time (g)** field should be automatically time stamped.
- Input the URL where the technical problem is occurring in the **URL (h)** field.
- Select the browser that you are using from the **Browser Type (i)** dropdown list. Options include **Chrome, Edge (79 or above), Firefox, Safari, Edge (78 or below), Internet Explorer, Other**.
- Select the application where the technical problem was experienced from the **Application (j)** dropdown list. The options will include the currently available applications.
- Select the type of problem experienced from the **Category of Problem (k)** dropdown list. The options include **Error received, Locked out of account, Unsure of what to do, Other**.
- Input detailed text of the technical problem that occurred in the **Description (l)** box. Be as thorough as possible, as this will help provide additional clarity to the technical problem being experienced.
- Upload an image in the **Screen Shot (m)** field. Please try to include the URL in the image and make sure that the image is not blurry.
- Select your county in the **County (n)** dropdown list.
- Input the record # in the **Record # (o)** field. This is an optional field that might apply to problems experienced in VPI, RACS, or ATS where there are record numbers that would be useful for troubleshooting.

The screenshot shows a form titled "Report Technical Problems" with the following fields:

- a** Name * :
- b** PTO Portal Username * :
- c** Email * :
- d** Phone Direct Line * :
- e** Other Phone:
- f** Date * :
- g** Time * :
- h** URL * :
- i** Browser Type * :
- j** Application * :
- k** Category of Problem * :
- l** Description * :
- m** Screen Shot * : No file chosen
- n** County:
- o** Record #:

12.3 Above these fields, you will notice two buttons.

The screenshot shows the "Report Technical Problems" form with the following section:

Report Technical Problems

I am reporting this for:

- Click the **Self (a)** button to automatically populate the **Name, PTO Portal Username, Email, Phone Direct Line, and County** fields mentioned above with your information.
- Click the **Someone Else (b)** button to manually enter all required fields.

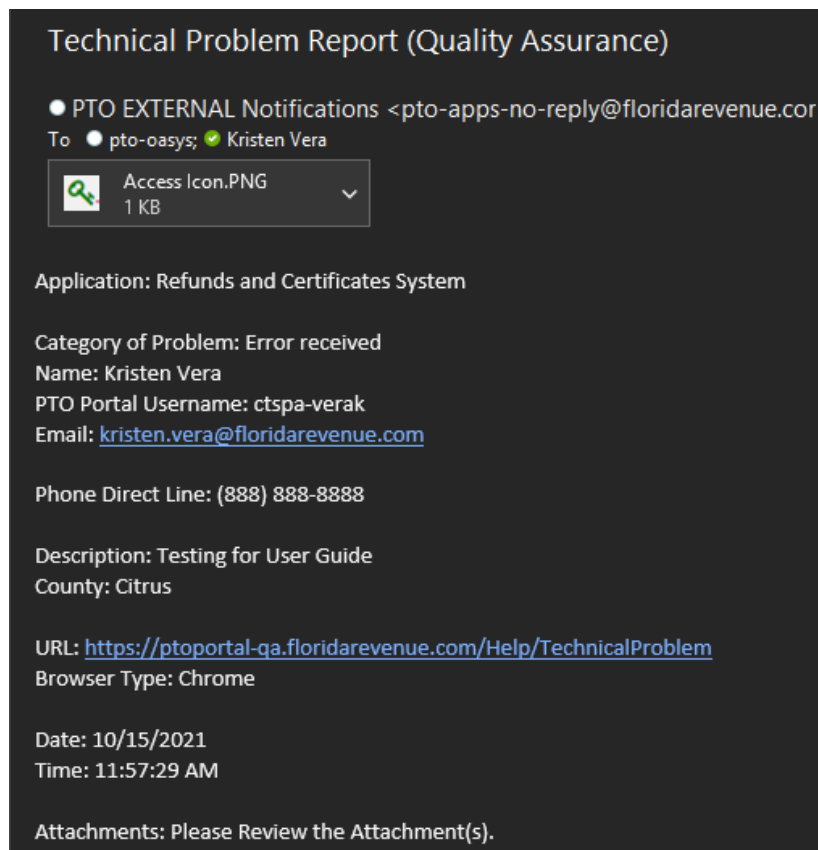
- After entering the necessary information, click **Submit**.

The screenshot shows a form with the following fields and values:

- Application ***: Refunds and Certificates System
- Category of Problem ***: Error received
- Description ***: Testing for User Guide
- Screen Shot ***: Choose Files | Access Icon.PNG
- County**: 19 Citrus
- Record #**: (empty)

The **Submit** button is highlighted with a red box.

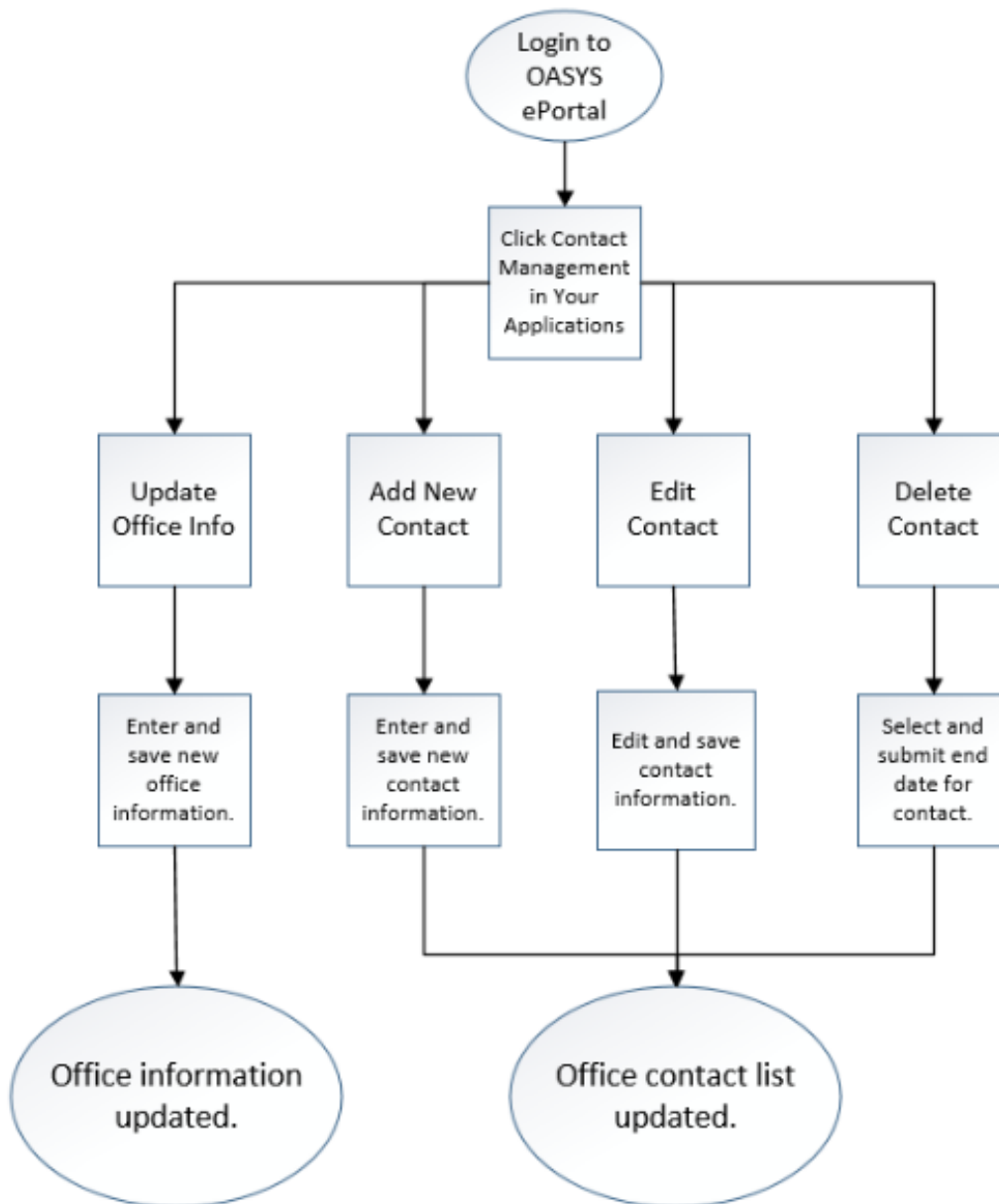
- 12.4** The user associated with the technical problem will receive a confirmation email like the one below detailing the technical problem.



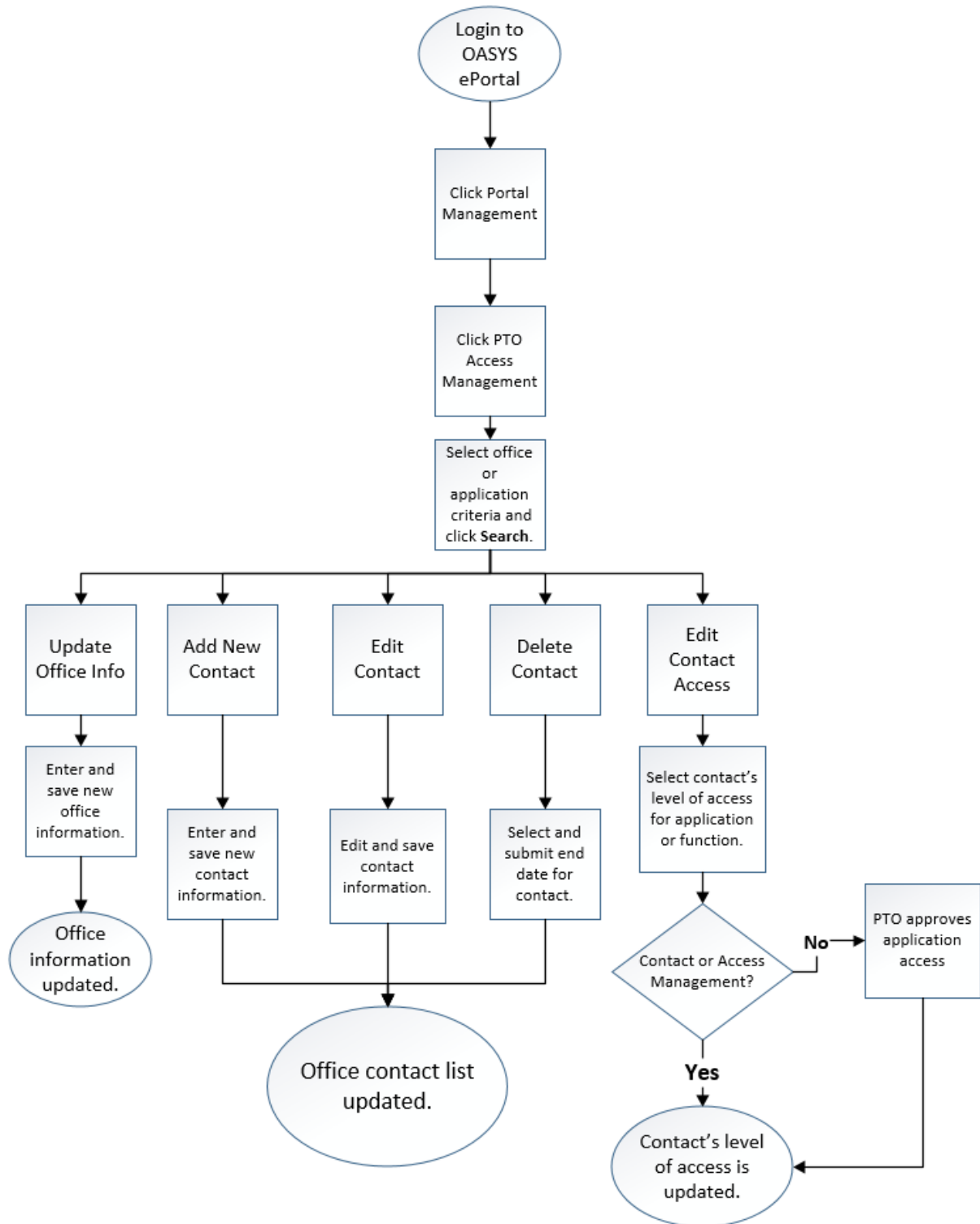
13. Contact and Access Management

The OASYS ePortal allows for county offices to manage their own contact list. Additionally, county offices can manage staff access to applications and functionalities within the OASYS ePortal. Sections 13 through 17 of this user guide are intended for those individuals who are designated as Contact and/or Access Managers within their county office. This functionality allows county offices to manage contact lists, request application access, and designate other Contact and Access Managers within their office. The following diagrams provide an overview of the Contact Management and Access Management process.

Contact Management



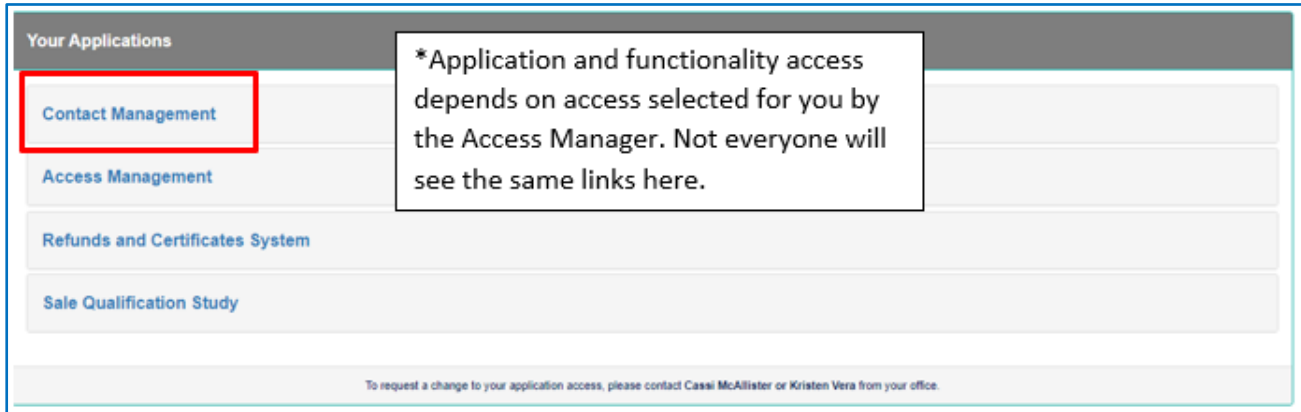
Access Management



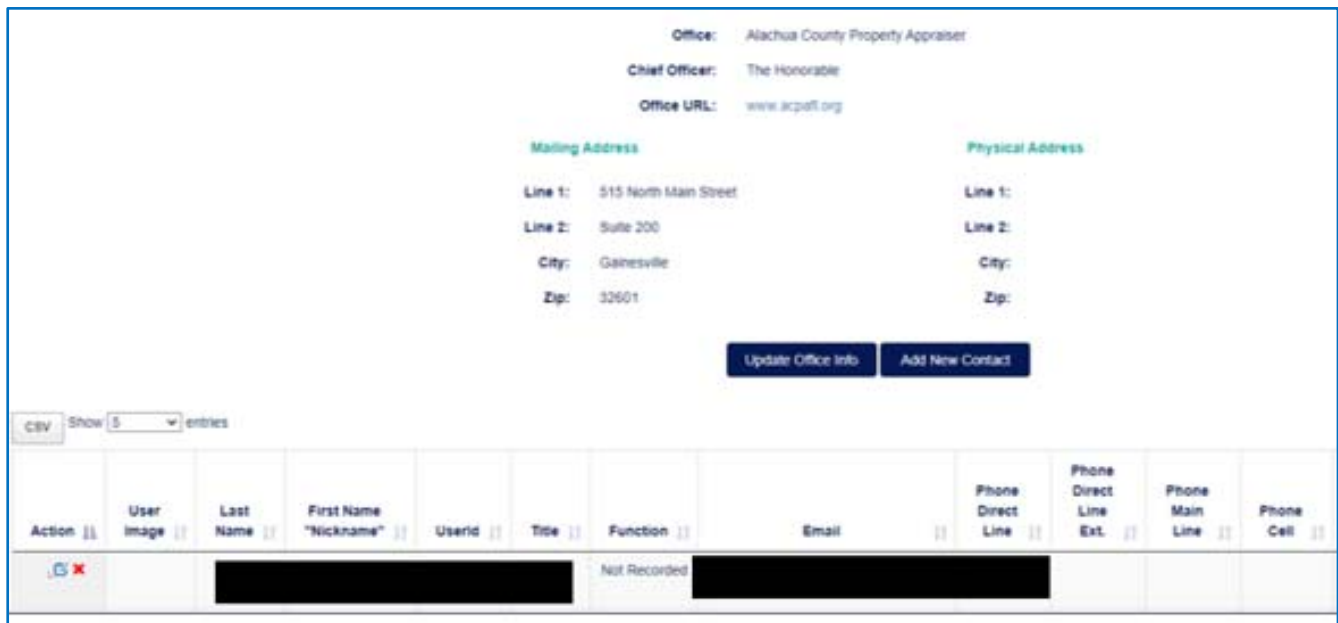
14. Contact Management

14.1 If you are designated as a Contact Manager for your office, you will see a **Contact Management** link in the **Your Applications** section of your **OASYS ePortal Dashboard**.

14.2 Click **Contact Management**.



14.3 You will arrive at the **Contact Management** screen. Here, you will see contact information for your office along with a data table containing the list of contacts. This data table can be exported to CSV and can be sorted on all columns.



- 14.4** Beneath the office information, you will notice two buttons.
- Select **Update Office Info (a)** to update address information for a specific office.
 - Select **Add New Contact (b)** to add a new contact to your office.



Office: Alachua County Property Appraiser

Chief Officer: The Honorable

Office URL: www.acpaff.org

Mailing Address

Line 1: 515 North Main Street

Line 2: Suite 200

City: Gainesville

Zip: 32601

Physical Address

Line 1:



Line 2:

City:

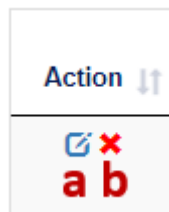
Zip:

a Update Office Info **b** Add New Contact

- 14.5** Under the **Action** column on the data table, you will notice two icons:

 **Edit** and  **Delete**

- Select the **Edit (a)** icon to edit an individual's contact information.
- Select the **Delete (b)** icon to delete an individual contact.



- 14.6** It is important to note that only a few individuals in your office will have Contact Management capabilities. You should reach out to the Access Manager in your office to request any changes to your access.

15. Updating, Adding, and Modifying Contact Information Examples

- 15.1** If you wish to update your office's contact information, click **Update Office Info** on the **Contact Management** screen.
- 15.2** You will arrive at the **Update Office Information** pop-up window shown below. Here, you will select or enter information for the following fields:
- Select the **Chief Officer (a)** from a dropdown list of contacts. Only the OASYS ePortal Manager can update the Chief Officer.
 - Optionally, enter an **Office Alias (b)**.
 - Enter the website URL in the **Office URL (c)** field.
 - For the office **Mailing Address**, enter **Line 1, Line 2, City, and Zip code (d)**.
 - Check the box next to **Physical address is the same as mailing address (e)** if the office's physical address is the same as the mailing address. If checked, then the **Physical Address** fields will gray out. If unchecked, then the user will have to enter information in the **Physical Address** fields.
 - For the office **Physical Address**, enter **Line 1, Line 2, City, and Zip code (f)**.
 - After selecting or entering all appropriate information, click **Submit**.

Update Office Information

a Chief Officer: Day, Kasondra

b Office Alias:

c Office URL: www.acpafi.org

d Mailing Address

Line 1: 515 North Main Street

Line 2: Suite 200

City: Gainesville

Zip: 32601

e Physical address is the same as mailing address

f Physical Address

Line 1:

Line 2:

City:

Zip:

Submit **Cancel**

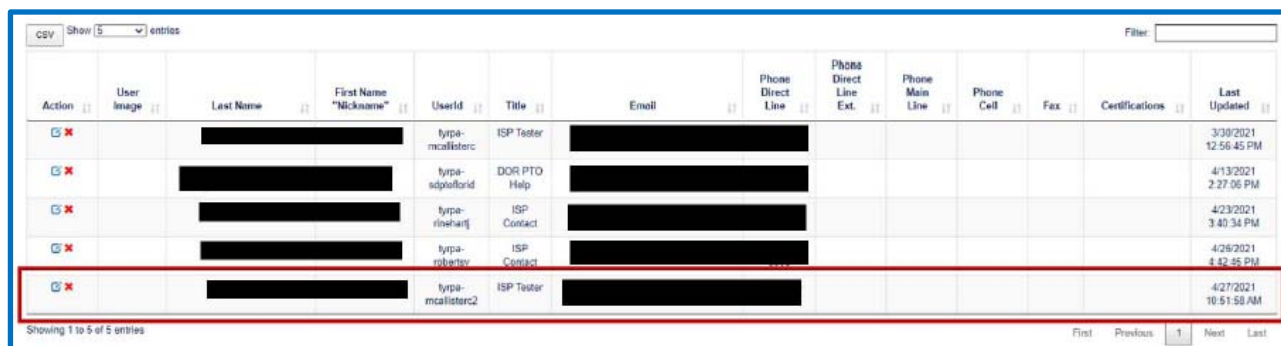
- 15.3** If you wish to add a new contact, click **Add New Contact** on the **Contact Management** screen. You will arrive at the **Add New Contact** pop-up window. Here, you will enter information for the following fields:
- Enter the **First Name (a)** of the contact. Please confirm that the first name is spelled correctly before submitting. This field cannot be updated once submitted. This field is required.
 - Enter the **Last Name (b)** of the contact. Please confirm that the last name is spelled correctly before submitting. This field cannot be updated once submitted. This field is required.
 - Enter the **Nickname (c)** of the contact if applicable. This field is optional and can be updated by the contact later.
 - Enter the **Title (d)** of the contact's job position. This field is required and can be updated by the Contact Manager later.
 - Enter the **Email (e)** for the contact. This field is required and can be updated by the Contact Manager later.
 - Enter the **Phone Direct Line (f)** for the contact. This field is required and can be updated by the Contact Manager later.
 - Enter the **Ext (g)** number to the **Phone Direct Line** if applicable. This field is optional and can be updated by the Contact Manager later.
 - Enter the **Phone Main Line (h)** if applicable. This field is optional and can be updated by the Contact Manager later.
 - Enter the **Phone Cell (i)** if applicable. This field is optional and can be updated by the Contact Manager later.
 - Enter the **Fax (j)** if applicable. This field is optional and can be updated by the Contact Manager later.











The screenshot shows a form titled "Add New Contact" with the following fields and labels:

- a** First Name*: [Redacted]
- b** Last Name*: [Redacted]
- c** Nickname: [Empty]
- d** Title*: [ISP Tester]
- e** Email*: [Redacted]
- f** Phone Direct Line*: [Redacted] **g** Ext: [Empty]
- h** Phone Main Line: [Empty]
- i** Phone Cell: [Empty]
- j** Fax: [Empty]


Below the fields, there is a red warning message: "Please confirm first and last name spelling before submitting. These cannot be updated once submitted." At the bottom, there are two buttons: "Submit" (highlighted with a red box) and "Cancel".

- 15.4 After entering all appropriate information, click **Submit**. Once you click **Submit**, an email is sent to the new contact requesting that they complete their account setup. The **Contact Management** page will also update to show the newly added contact.



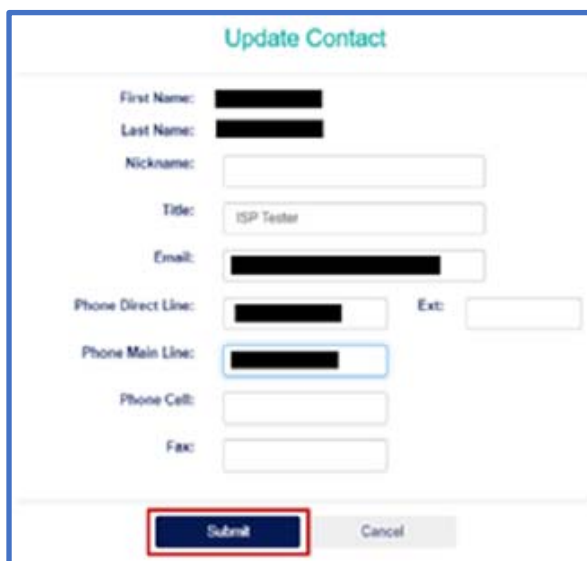
Action	User Image	Last Name	First Name "Nickname"	UserId	Title	Email	Phone Direct Line	Phone Direct Line Ext.	Phone Main Line	Phone Cell	Fax	Certifications	Last Updated
 				lypa-mcallsterc	ISP Tester								3/30/2021 12:56:45 PM
 				lypa-sdptaforid	DOR PTO Help								4/13/2021 2:27:06 PM
 				lypa-rishartj	ISP Contact								4/23/2021 3:40:34 PM
 				lypa-rbaltsv	ISP Contact								4/26/2021 4:32:55 PM
 				lypa-mcallsterc2	ISP Tester								4/27/2021 10:51:58 AM

Showing 1 to 5 of 5 entries

- 15.5 If you wish to edit an existing contact, click the  **Edit** icon on the **Contact Management** page.

- 15.6 You will arrive at the **Update Contact** pop-up window. Here, you can edit the **Nickname**, **Title**, **Email**, **Phone Direct Line**, **Ext**, **Phone Main Line**, **Phone Cell**, and **Fax** fields mentioned in the previous example of adding a new contact.

- After editing a contact's information, click **Submit**. Once you click **Submit**, the **Contact Management** page will update to show the newly edited information for the contact.
- It is important to note that the **First Name** and the **Last Name** fields cannot be edited via this method. To edit the name of the contact, you must delete the current contact and add them as a new contact.



Update Contact

First Name:

Last Name:

Nickname:

Title:

Email:

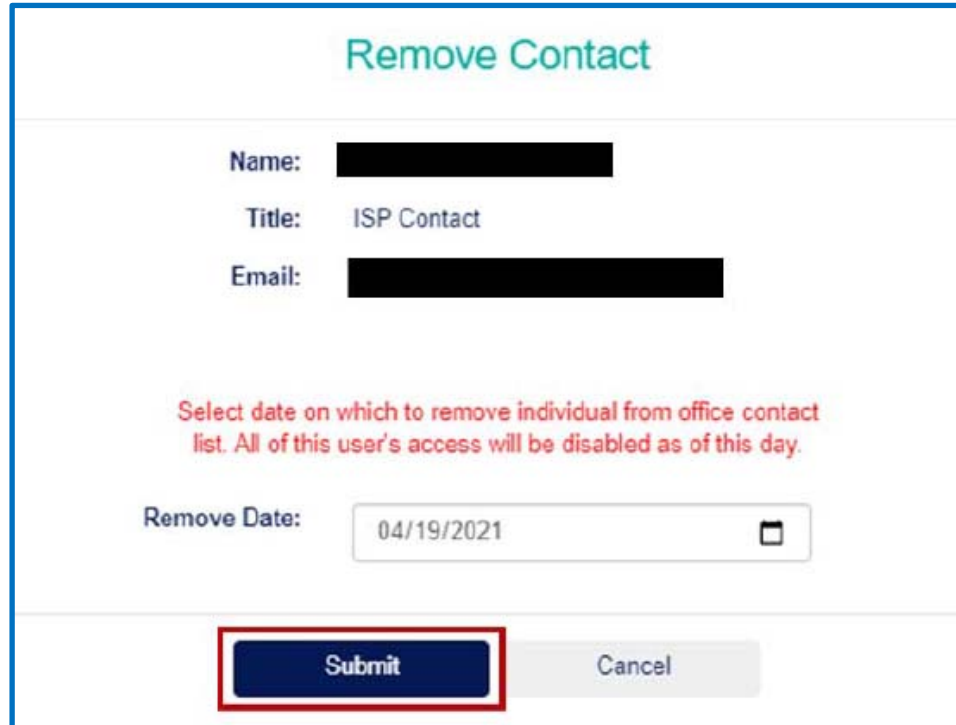
Phone Direct Line: Ext:

Phone Main Line:

Phone Cell:

Fax:

- 15.7** If you wish to delete an existing contact, click the **Delete** icon (**✖**) on the **Contact Management** page. You will arrive at the **Remove Contact** pop-up window. Here, you will enter the **Remove Date** before clicking **Submit**. Be sure to select the date on which to remove the individual from the office contact list. All access for this user will be disabled as of the selected date.



Remove Contact

Name: [REDACTED]

Title: ISP Contact

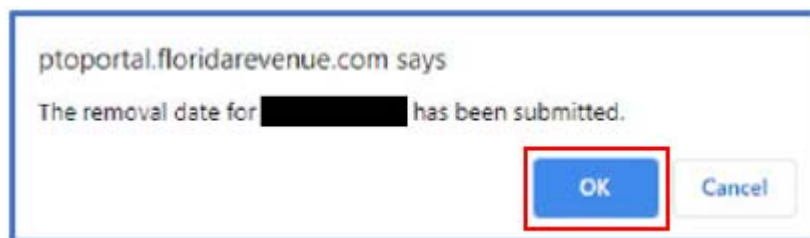
Email: [REDACTED]

Select date on which to remove individual from office contact list. All of this user's access will be disabled as of this day.

Remove Date: 04/19/2021

Submit Cancel

- After clicking **Submit**, a confirmation message should appear. Click **OK**.



ptportal.floridarevenue.com says

The removal date for [REDACTED] has been submitted.

OK Cancel

- The **Contact Management** page will update and no longer show the removed contact if the removal date has passed.
- The Contact Manager and Access Manager for your office should receive an email like the one below confirming that the contact has been removed.

PTO ePortal access was removed by Jane for [REDACTED] and is effective on 4/19/2021 12:00:00 AM. If you believe this contact's PTO ePortal access was removed in error, please contact Jane Rinehart for assistance.

16. Access Management

16.1 If you are designated as an Access Manager for your office, you will have an **Access Management** link in the **Your Applications** section of your **OASYS ePortal Dashboard**.

16.2 Click **Access Management**. You will arrive at the **Access Management** screen.

The screenshot shows the 'Your Applications' section of the OASYS ePortal dashboard. A red box highlights the 'Access Management' link. A callout box contains the text: '*Application and functionality access depends on access selected for you by the Access Manager. Not everyone will see the same links here.' Below the applications list, there is a footer note: 'To request a change to your application access, please contact Cassi McAllister or Kristen Vera from your office.'

16.3 Here, you will see contact and access information for your office in a data table. Note that this data table can be exported to CSV and that it can be sorted on all columns.

CSV Show 5 entries

Action	User Image	Last Name	First Name "Nickname"	Userid	Title	Function	Access Management	Central Assessment	Contact Management	Refunds and Certificates System	Sale Qualification Study	Truth in Millage
		[Redacted]	[Redacted]	[Redacted]	ISP Contact	Not Recorded	User Primary		User Primary	View Only	User Primary	
		[Redacted]	[Redacted]	[Redacted]	Tester	Not Recorded						
		[Redacted]	[Redacted]	[Redacted]	PTO Tester	Not Recorded						
		[Redacted]	[Redacted]	[Redacted]	PTO Tester	Not Recorded				View Only		
		[Redacted]	[Redacted]	[Redacted]	PTO Tester	Not Recorded				View Only		

16.4 Under the **Action** column on the data table, you will notice three icons:


 **Access**  **Edit**  **Delete**

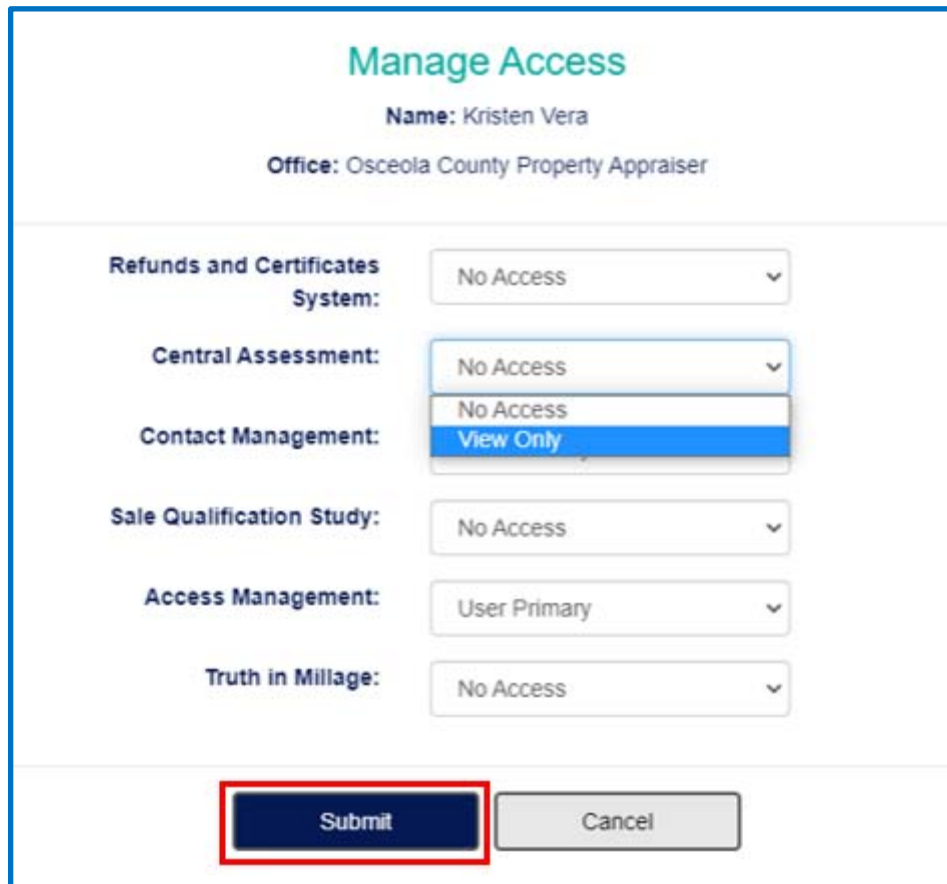
- Select the **Access** (a) icon to modify contact access to OASYS ePortal applications and/or functionalities.
- Select the **Edit** (b) icon to edit an individual's contact information.
- Select the **Delete** (c) icon to delete an individual contact.



16.5 It is important to note that only one or a few individuals in your office will have Access Management capabilities. You should reach out to the Access Manager in your office to request any changes to your access.

17. Requesting and Removing Access Examples

- 17.1** If you wish to request access to an application for a contact, click the  **Access** icon on the **Access Management** screen next to that individual contact's name.
- 17.2** You will arrive at the **Manage Access** pop-up window. Here, you can modify a contact's access to specific OASYS ePortal applications. You can also designate a contact as a Contact Manager or Access Manager from this pop-up window.
- For example, this contact currently has **No Access** to **Central Assessment**.
 - If this contact should have **View Only** access to **Central Assessment**, select the appropriate option from the dropdown list next to that application.
 - Click **Submit**.



The screenshot displays the 'Manage Access' window for a contact named Kristen Vera, who is an Osceola County Property Appraiser. The window lists several applications with their current access levels:

Application	Current Access Level
Refunds and Certificates System:	No Access
Central Assessment:	No Access (dropdown menu is open, showing 'View Only' as a selected option)
Contact Management:	No Access
Sale Qualification Study:	No Access
Access Management:	User Primary
Truth in Millage:	No Access

At the bottom of the window, there are two buttons: 'Submit' (highlighted with a red box) and 'Cancel'.

17.3 It is important to note access to an OASYS ePortal application requires the application owner within PTO to approve the request. Therefore, a status of **Requested: View Only** in the column for that specific application.

Action	User Image	Last Name	First Name "Nickname"	Userid	Title	Function	Access Management	Central Assessment	Contact Management
		Vera	Kristen "Kris"	oscpa-verak	PTO Contact	Not Recorded	User Primary	Requested: View Only	User Primary

17.4 Once access is approved, the status of the contact's access will update to show the level of access.

Action	User Image	Last Name	First Name "Nickname"	Userid	Title	Function	Access Management	Central Assessment	Contact Management	Refunds and Certificates System
		Vera	Kristen "Kris"	oscpa-verak	PTO Contact	Not Recorded	User Primary	View Only	User Primary	

17.5 If you are requesting that someone be an Access Manager or a Contact Manager, the request will not go through an approval process.

- For example, the contact below currently has **No Access** to **Contact Management**.
- If this contact should have **Primary Access** to **Contact Management**, select the appropriate option from the dropdown list next to **Contact Management**.
- Click **Submit**.

Manage Access

Name: Lizette Kelly
Office: Osceola County Property Appraiser

Refunds and Certificates System:	<input type="text" value="No Access"/>
Central Assessment:	<input type="text" value="No Access"/>
Contact Management:	<input type="text" value="No Access"/>
Sale Qualification Study:	<input type="text" value="No Access"/> <input type="text" value="View Only"/> <input style="background-color: #007bff; color: white;" type="text" value="User Primary"/> <input type="text" value="User Backup"/>
Access Management:	<input type="text" value="No Access"/>
Truth in Millage:	<input type="text" value="No Access"/>

17.6 After clicking **Submit**, the contact’s level of access for **Contact Management** will update without further approval.

Action	User Image	Last Name	First Name "Nickname"	Userid	Title	Function	Access Management	Central Assessment	Contact Management
		Kelly	Lizette	oscpa-kellyl2	Sr. Program Admin	Not Recorded			User Primary

17.7 If you wish to remove access to application for a contact, click the **Access** icon on the **Access Management** screen next to a specific contact. You will arrive at the **Manage Access** pop-up window. Here, you can modify a contact’s access to specific OASYS ePortal applications and Contact and Access Management functions

- For example, this contact currently has **View Only** access to **Central Assessment**.
- If this contact should have **No Access** to **Central Assessment**, select the appropriate option from the dropdown list next to that application.
- Click **Submit**.
- After clicking **Submit**, the contact’s access to that application will be removed without going through an approval process.
- The Access Manager in the office will receive emails when access is approved and removed for a contact.

Manage Access

Name: Kristen Vera
Office: Osceola County Property Appraiser

Refunds and Certificates System:	No Access
Central Assessment:	View Only
Contact Management:	No Access
Sale Qualification Study:	No Access
Access Management:	User Primary
Truth in Millage:	No Access

Submit
Cancel