User Guide

# OASYS ePortal

Florida Department of Revenue

Property Tax Oversight

April 2022

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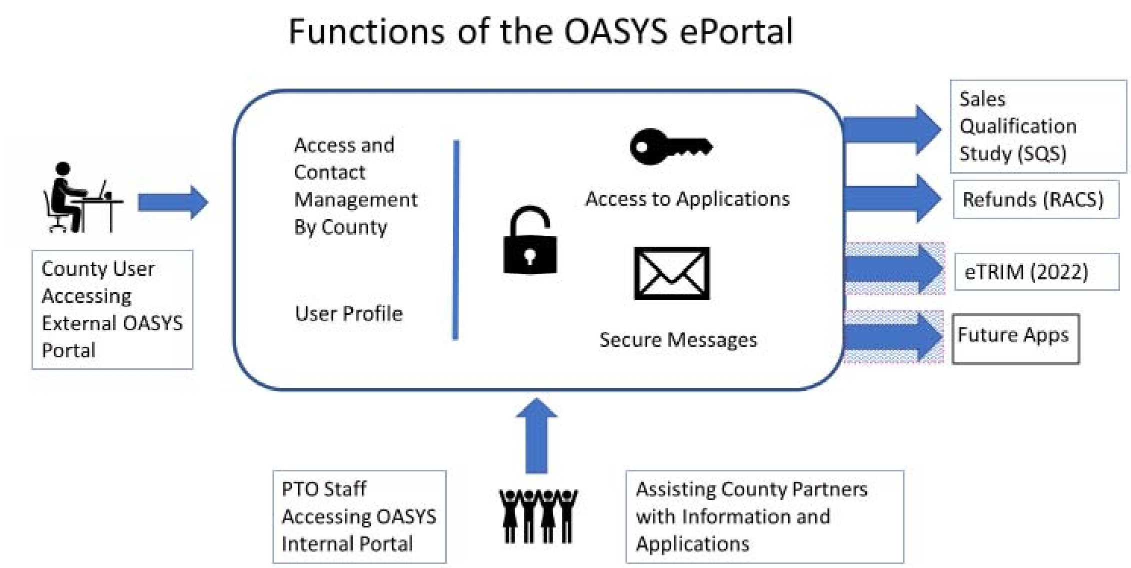
# 1. Introduction

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 **Sys**tem 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:

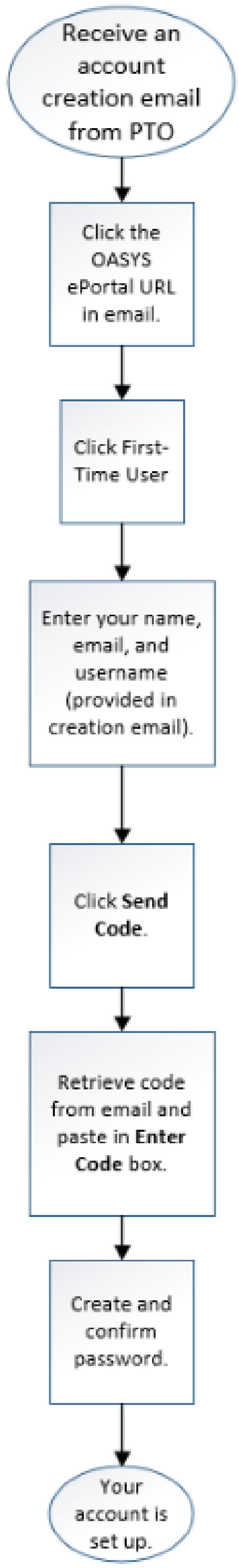
- Access all PTO applications with a single sign-on.
- Receive and store messages from PTO in a central, secure location.

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.

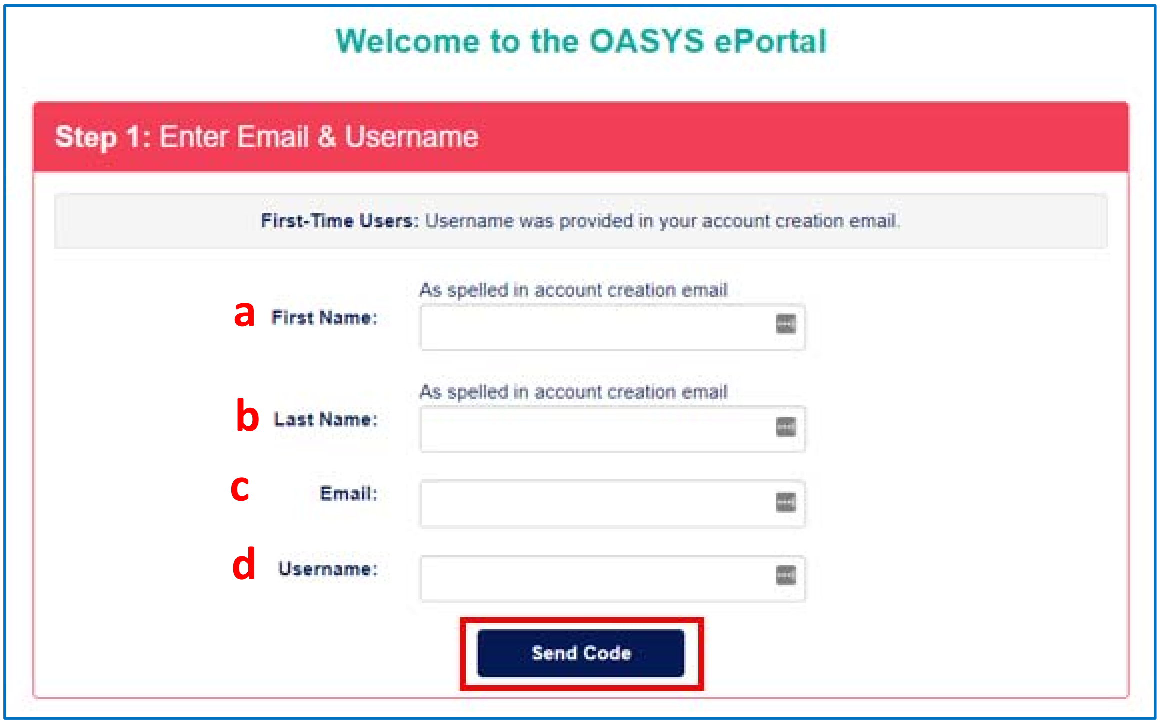
> Jane Rinehart,
>
> An account has been created for you in the Florida Department of Revenue (Department) Property Tax Oversight (PTO) ePortal by PTO. To complete your account creation, please complete the following steps in order.
>
> 1. Verify the spelling of the name (Jane Rinehart) on your account. 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://ptoportal.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://ptoportal.floridarevenue.com then click the **First-Time User** link under the **Login** button.

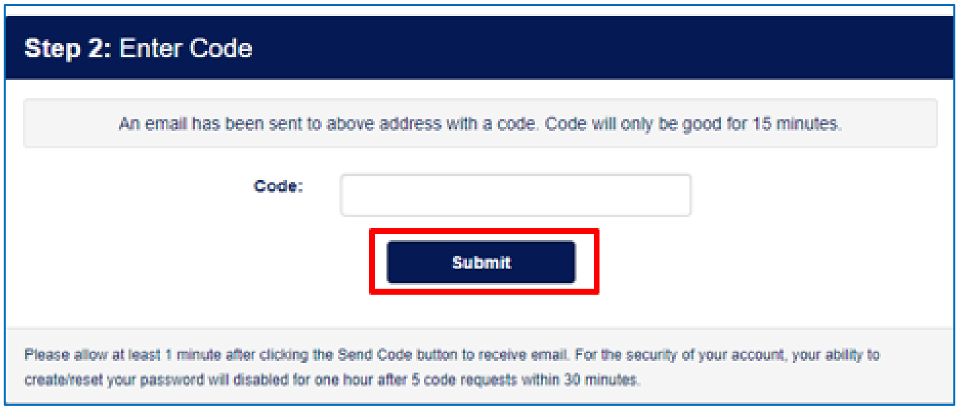
**2.3** You will arrive at the **Welcome to the OASYS ePortal** screen. Here, you will enter the following fields under **Step 1: Enter Email and Username**.

- 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.



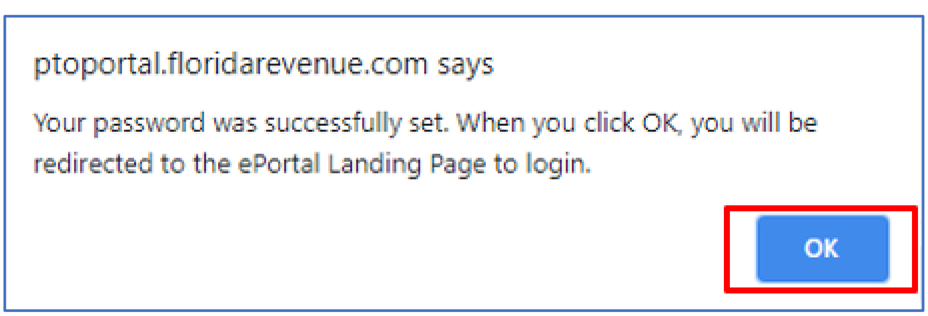

**2.4** After entering the necessary information, click **Send Code**. If the data entered is not found in the system, you will receive a message to review and re-enter your credentials. This message should also include a contact for help if you continue to receive this message. If the data entered is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



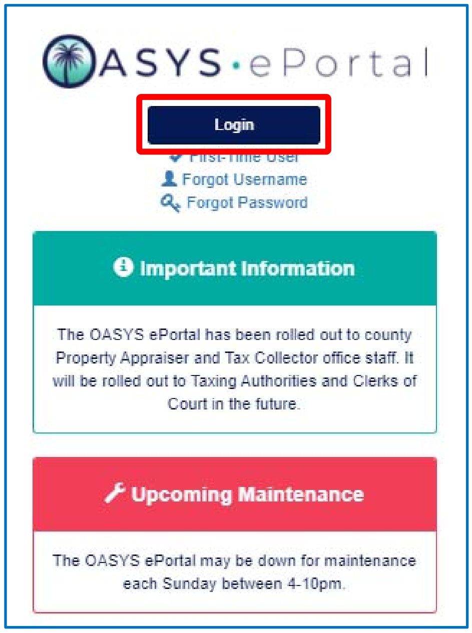

**2.6** You will arrive at **Step 3: Create Password** where you will create and confirm your password. After confirming your password, click **Update Password**.


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



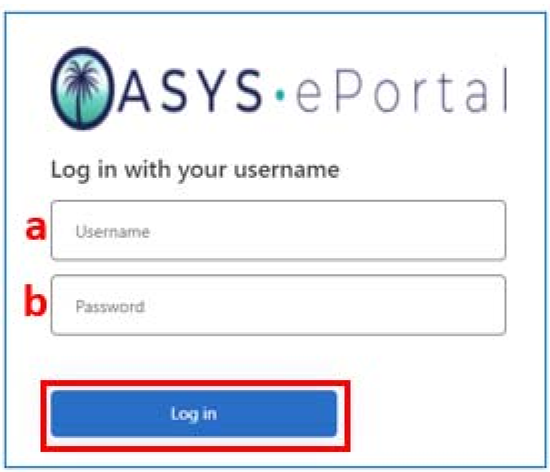
## 3. Login

**3.1** Browse to https://ptoportal.floridarevenue.com and click the **Login** button.



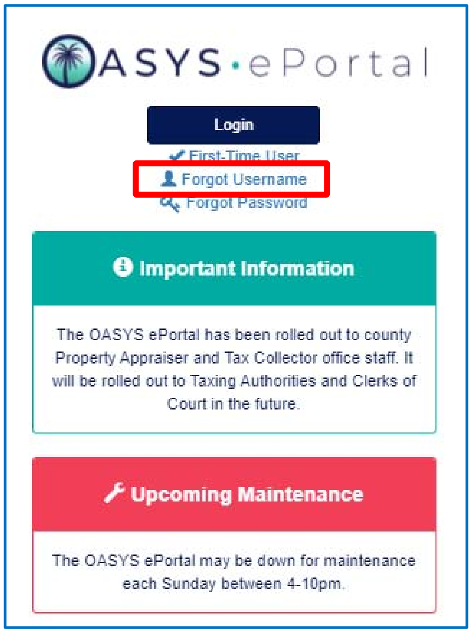

**3.2** You will arrive at the Florida Department of Revenue sign in screen. Here, you will enter the following information:

- 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.



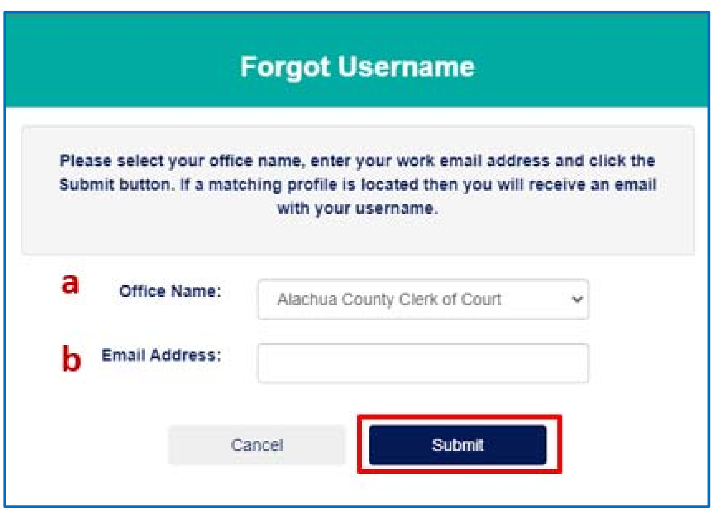
## 4. Forgot Username

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

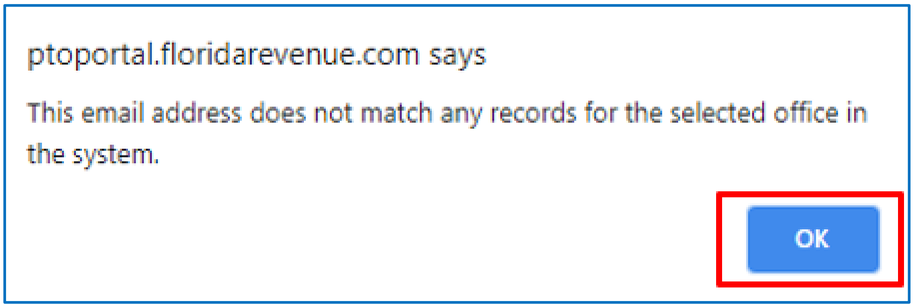



**4.2** You will arrive at the **Forgot Username** screen. Here, you will enter or select the following information:

- 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**.



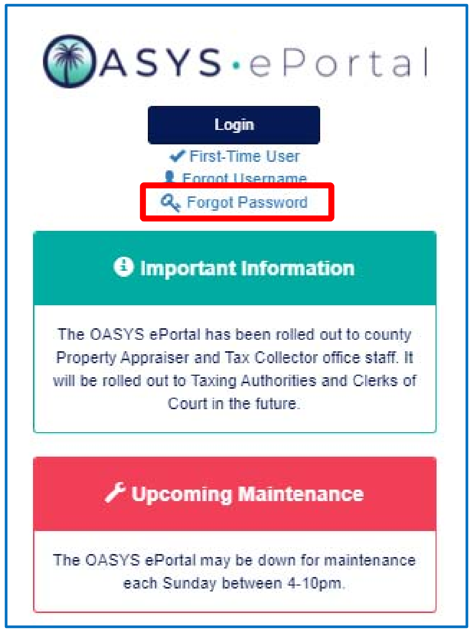
**4.3** If the system does not locate a matching profile, you will receive this message:




**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.

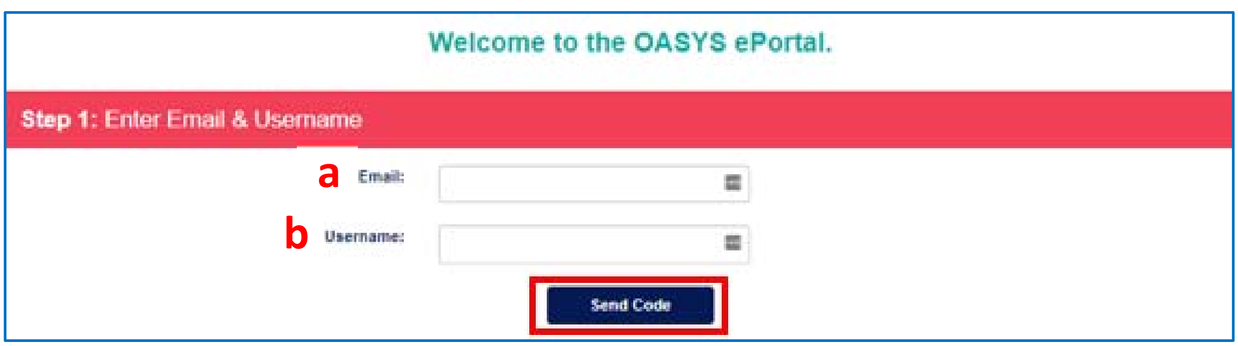
## 5. Forgot Password

**5.1** Browse to [https://ptoportal.floridarevenue.com](https://ptoportal.floridarevenue.com) and click **Forgot Password**.

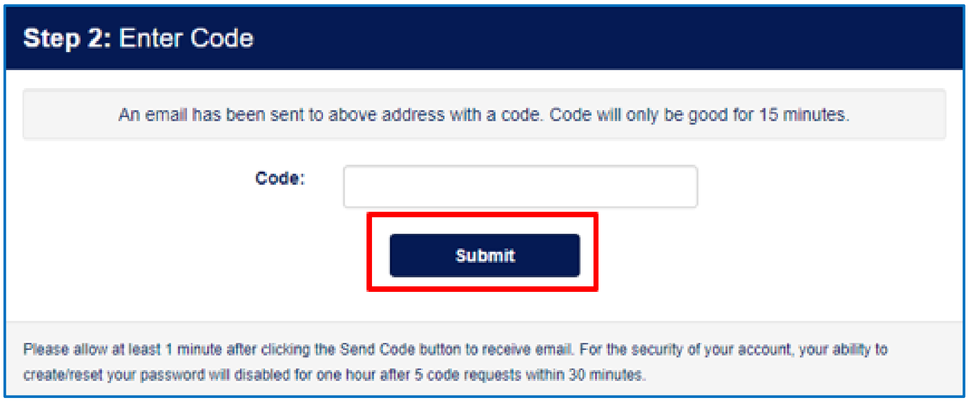



**5.2** You will arrive at the **Welcome to the OASYS ePortal** screen. Enter the following fields under **Step 1: Enter Email & Username:**

- 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**.

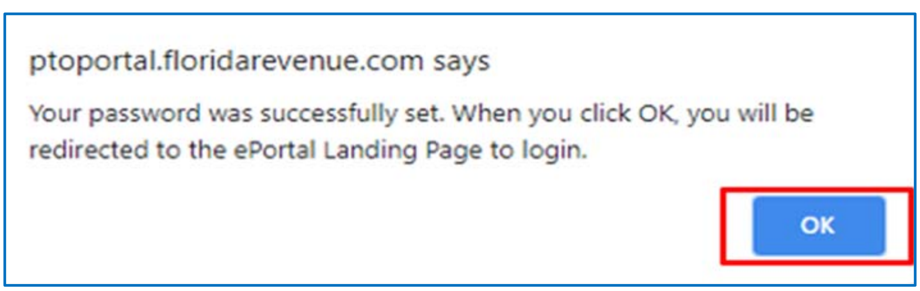


**5.3** Enter the **Verification Code** under **Step 2: Enter Code**. Then, click **Submit**.




**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**.

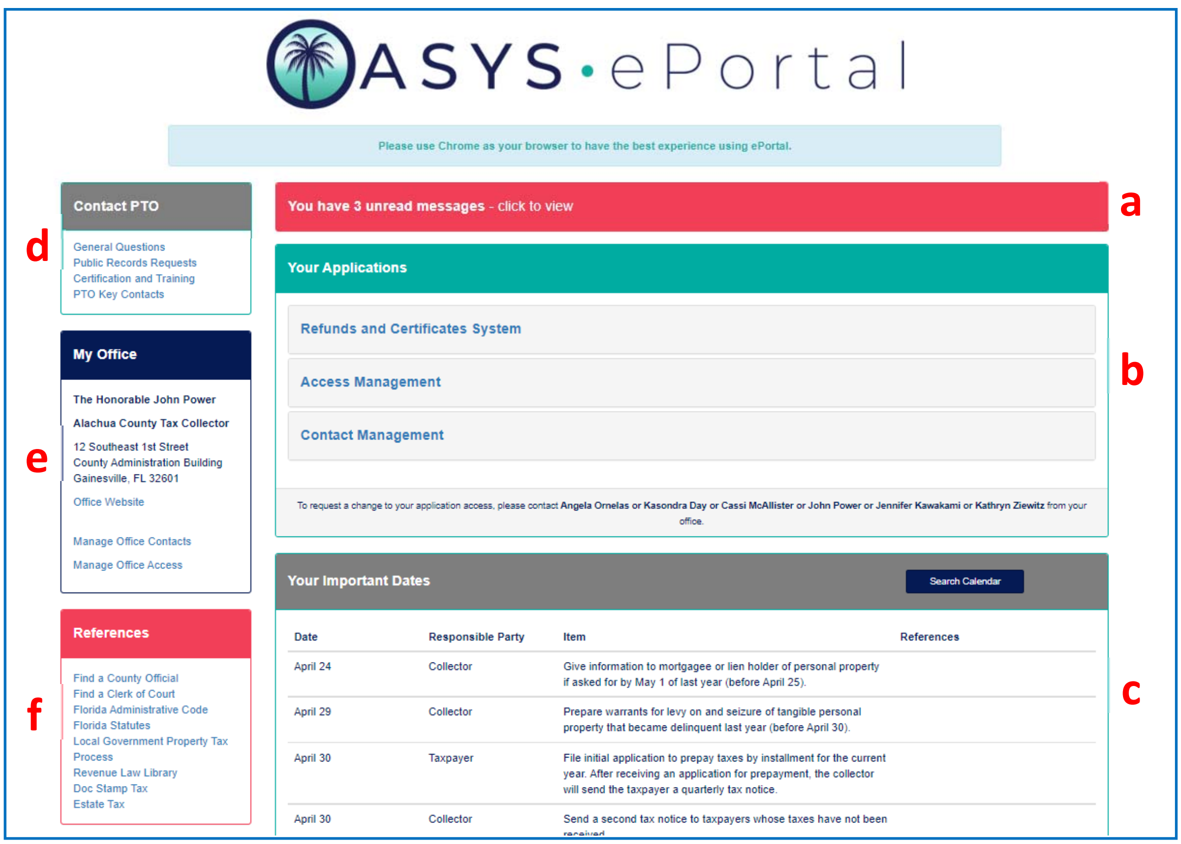

**5.5** You will receive a confirmation message. Click **OK**. You are now finished updating your password.



## 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.

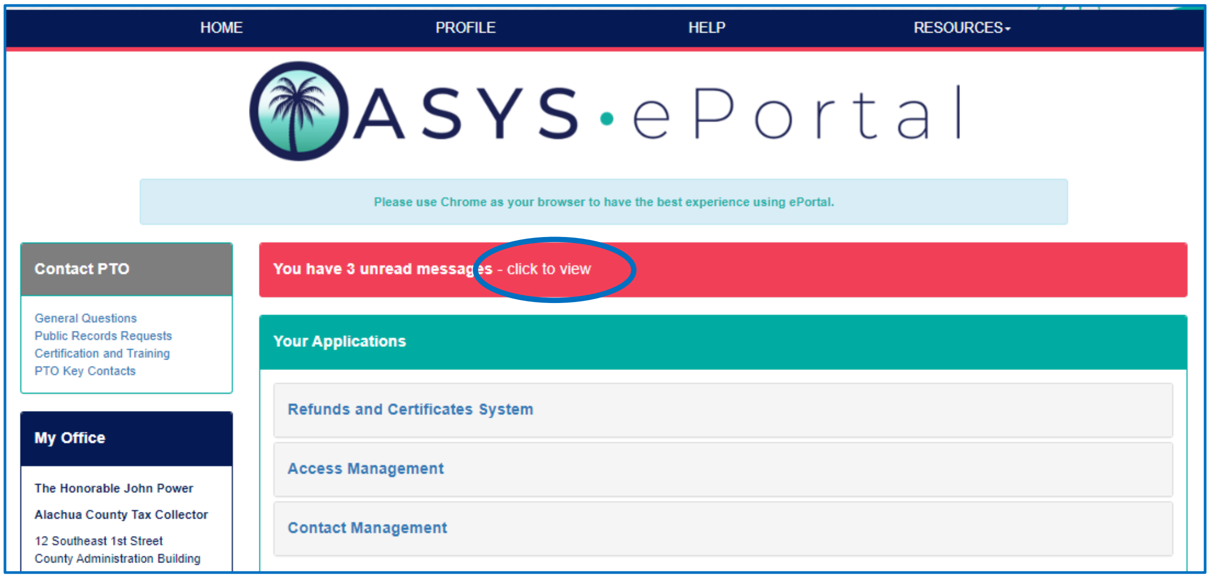


**6.2** Several useful tabs are available in the blue ribbon at the top of your **OASYS ePortal Dashboard.** The ribbon, with the same four tabs, appears on all screens within the **OASYS ePortal**. The function of each tab is described below:

- 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.

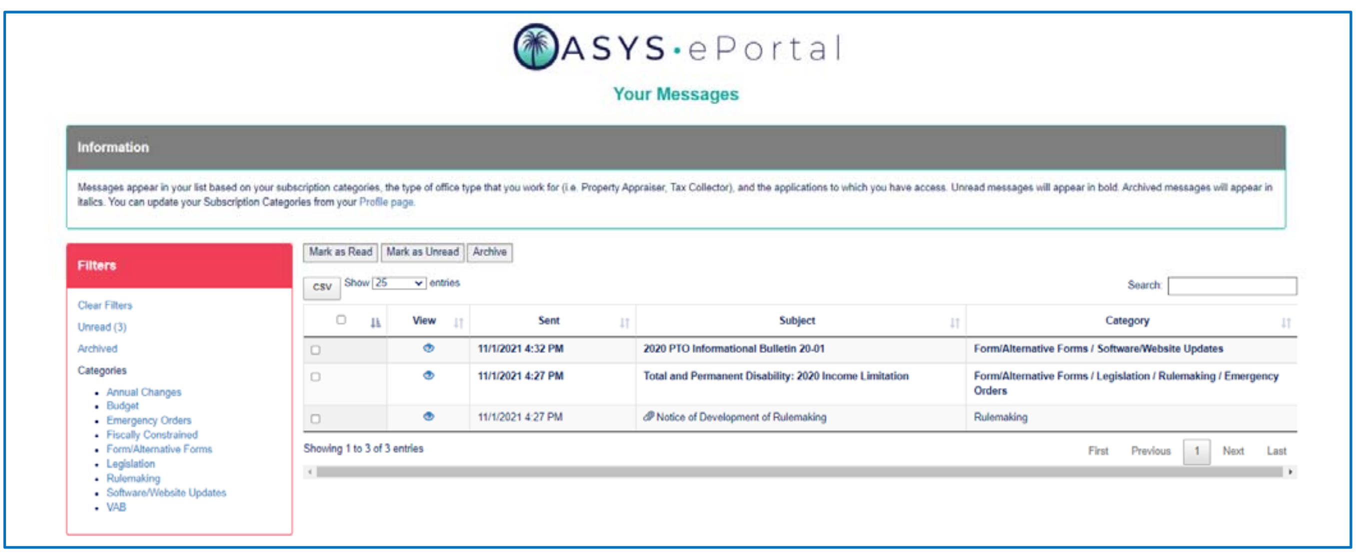
## 7. Accessing OASYS ePortal Messages

**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.



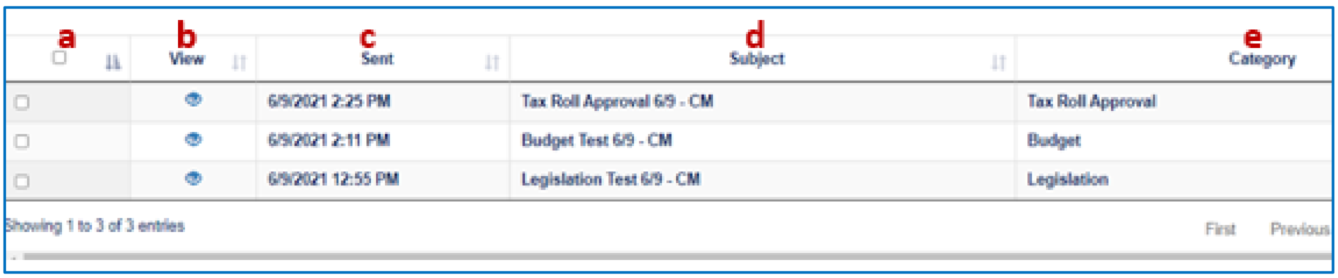

**7.2** Messages will appear in your list based on your subscription categories, the type of office that you work for (i.e., Property Appraiser, Tax Collector, etc.), and the applications to which you have access. As mentioned in the **Manage Subscription Categories** section of this document, you can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



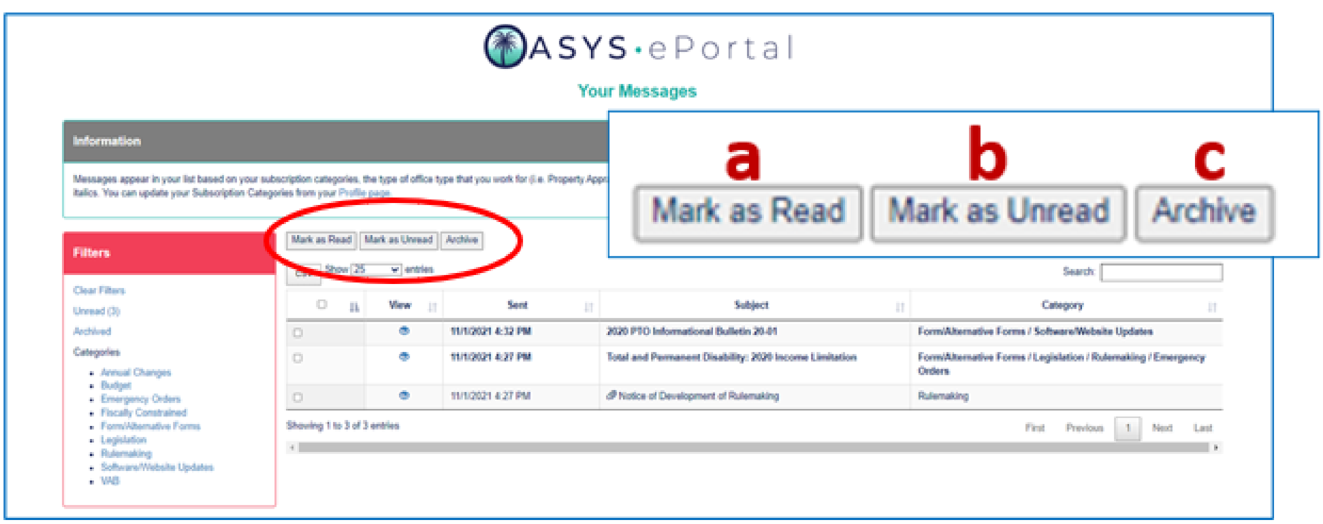
**7.3** The **Your Messages** screen features several action links and data for each message row in the data table:

- 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.

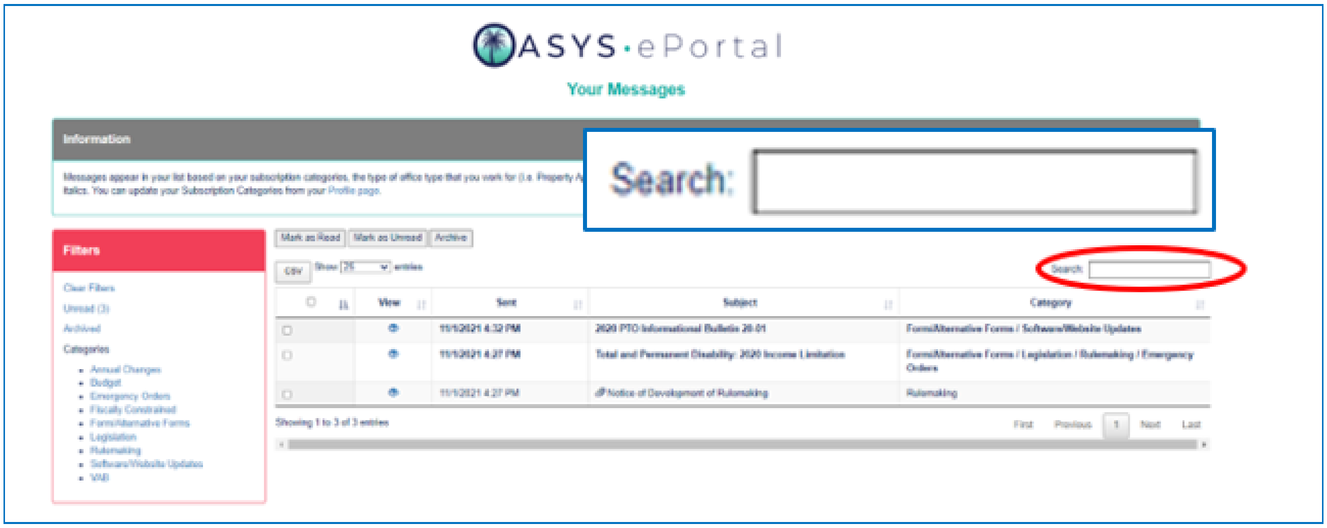



**7.4** Notice the three buttons above the inbox.

- 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.



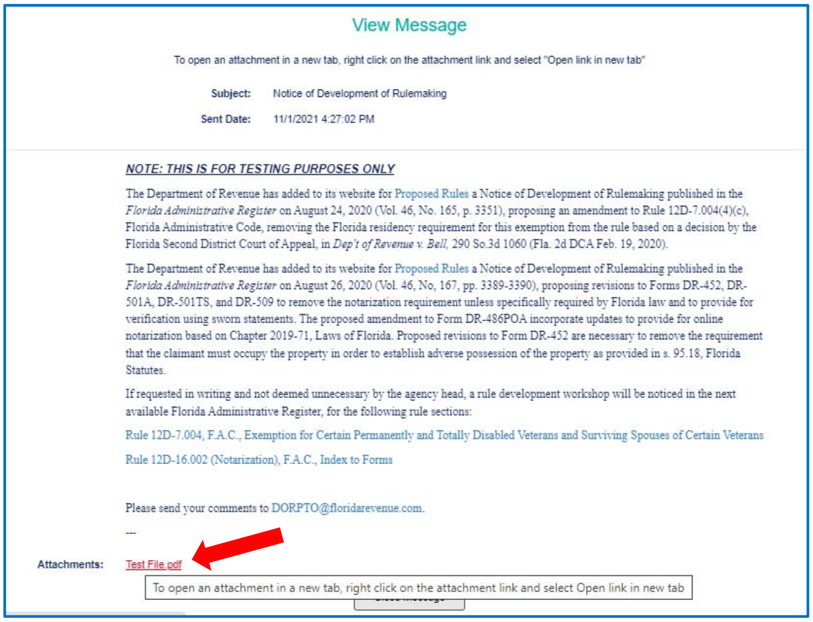

**7.6** By clicking the icon in the **View** column next to a message, you will arrive at the **View Message** pop-up window. After reading the message, you can click one of two buttons.

– 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.

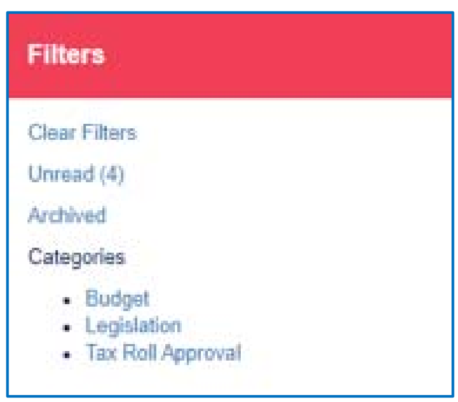

**7.7** Messages that contain an attachment will have the **Paperclip** icon next to the **Subject** of the message like the message below.

**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:

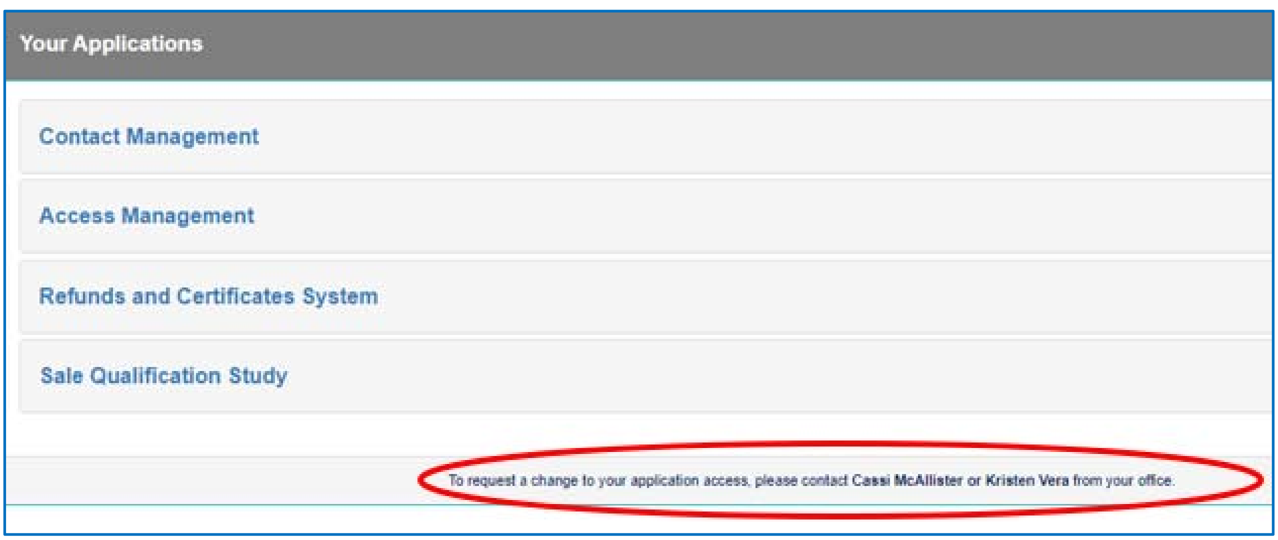
- Messages within the OASYS ePortal are one-way. This means that PTO can send messages to county users through the OASYS ePortal, but county users cannot reply to these messages through the OASYS ePortal.
- Messages will also appear in the county user's email inbox associated with their OASYS ePortal 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.



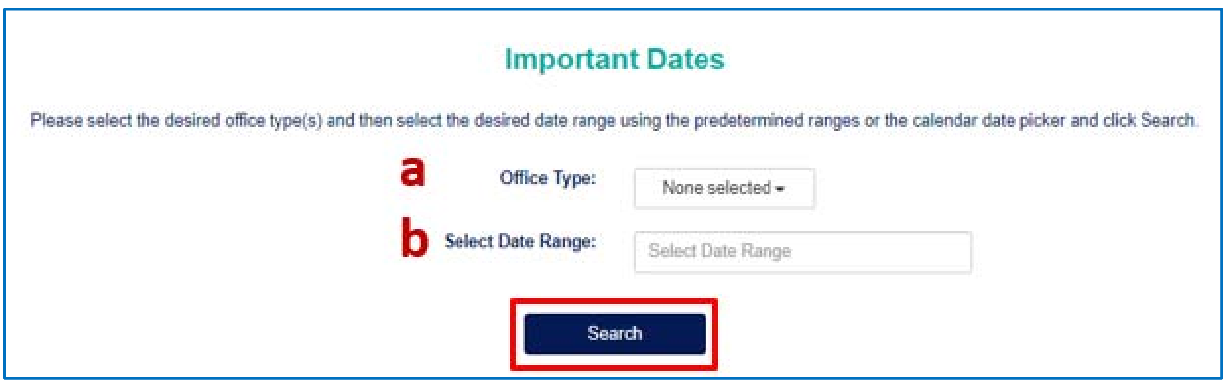
## 9. Important Dates

**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.

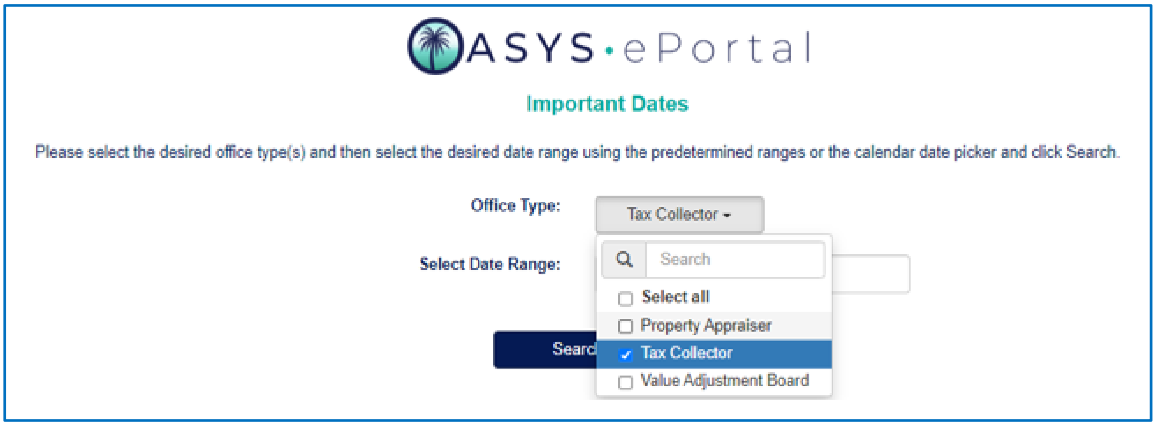
**9.2** Click **Search Calendar** to access and view a full list of important dates.


**9.3** You will arrive at the **Important Dates** screen. Here, you will select the following fields:

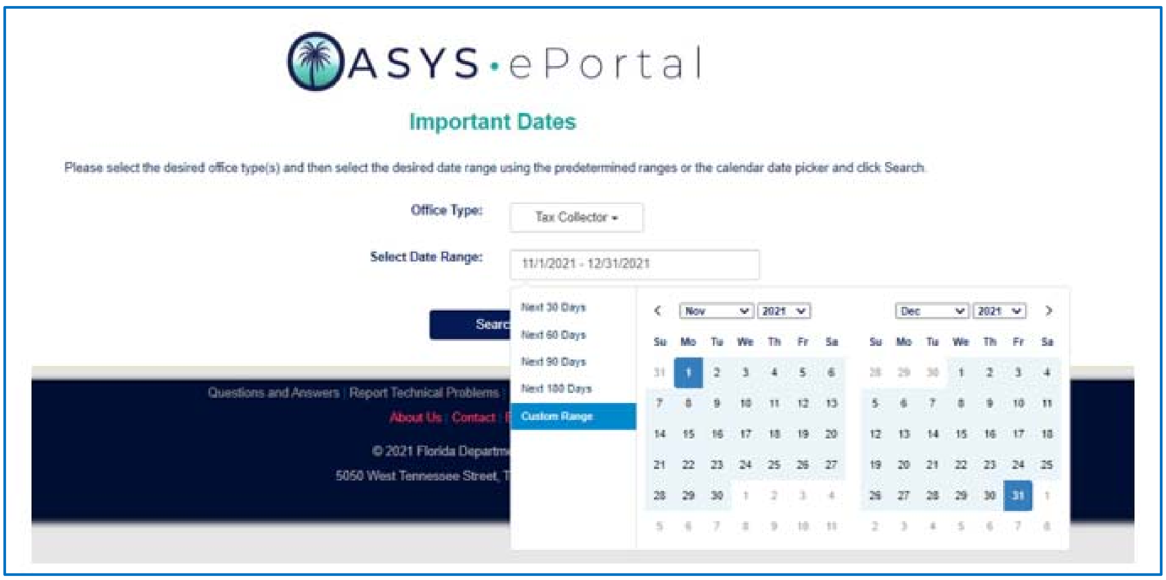
- Use the **Office Type** (a) dropdown list to select the type of office for which you wish to see important dates.
- Use the **Select Date Range** (b) calendar to select the beginning and end date range for which you wish to see important dates.
- After selecting the necessary information, click **Search**.



**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.


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

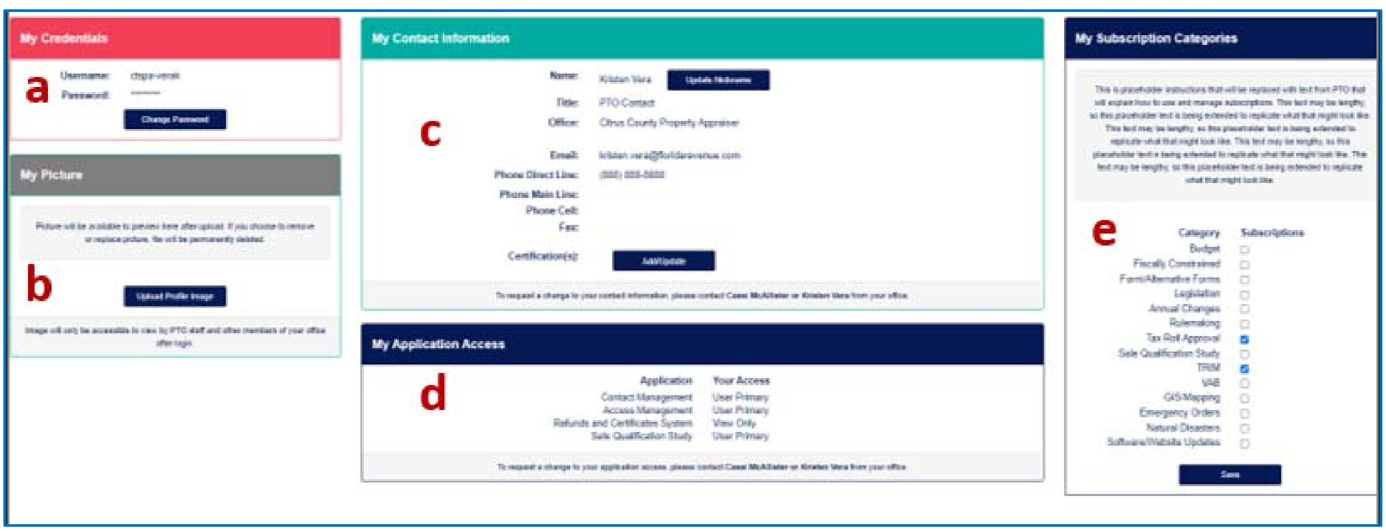
- Every column can be sorted ascending or descending by clicking the respective **Arrow** to the right of the column heading.
- The table results can be filtered by entering text in the **Filter** text box (upper right corner of the table results).
- The number of entries can be modified by selecting 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.

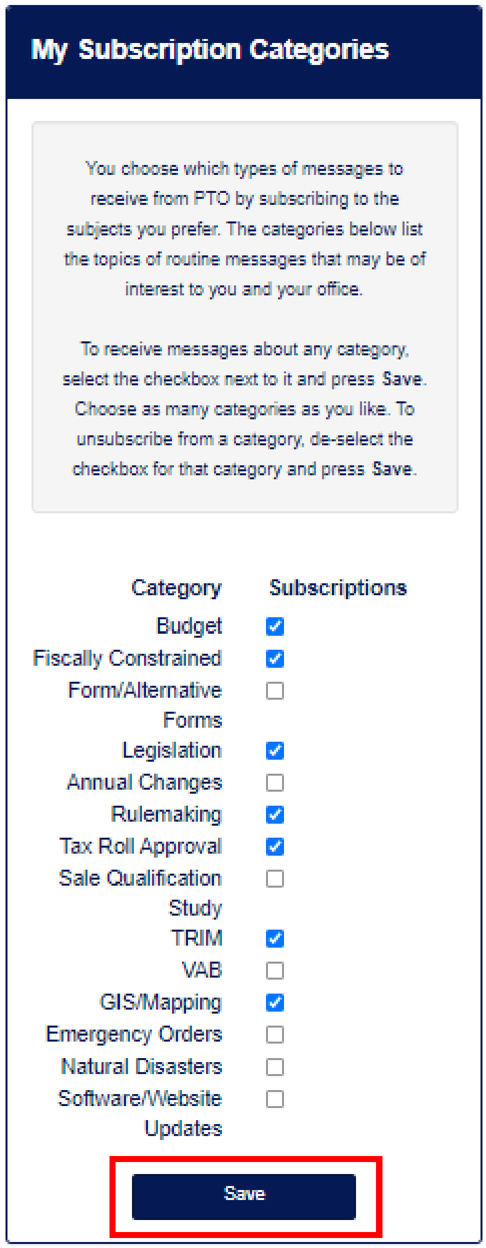
- The **My Credentials** (**a**) feature allows you to change your password by clicking **Change Password**.
- The **My Picture** (**b**) feature allows you to upload a profile image by click **Upload Profile Image**.
- The **My Contact Information** (**c**) feature allows you to change select pieces 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**.



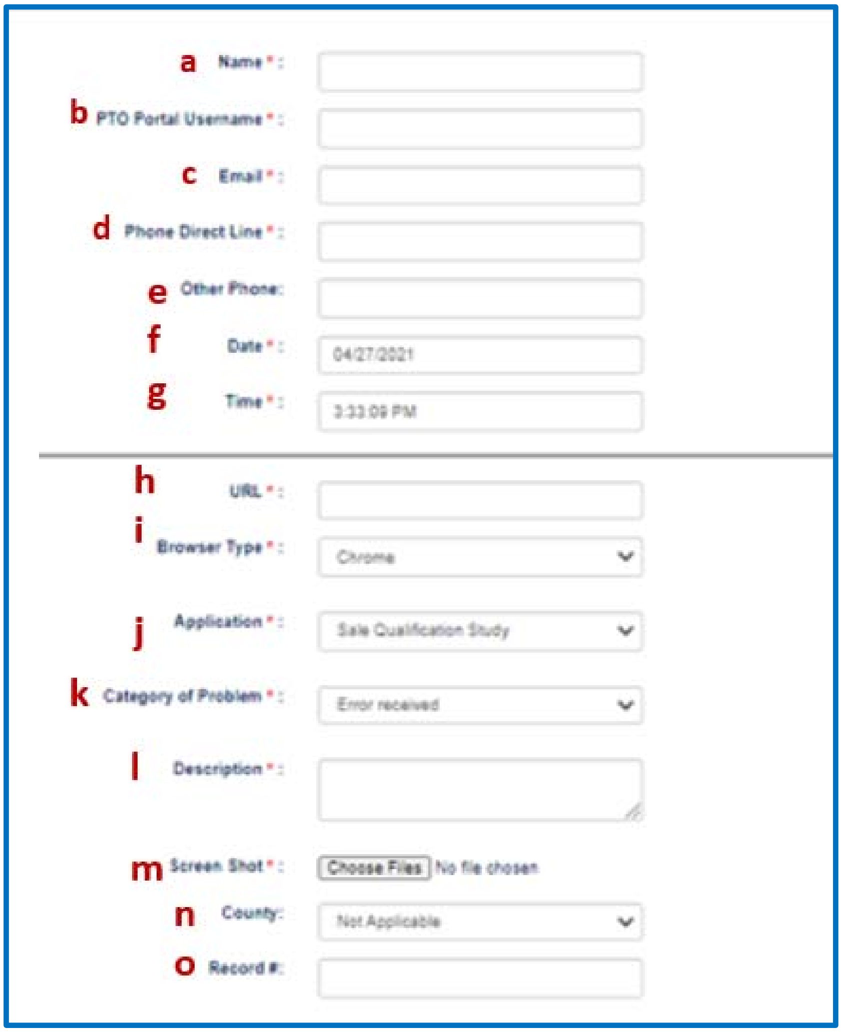

**11.3** This will control what messages you receive.

## 12. Reporting Technical Problems

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


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

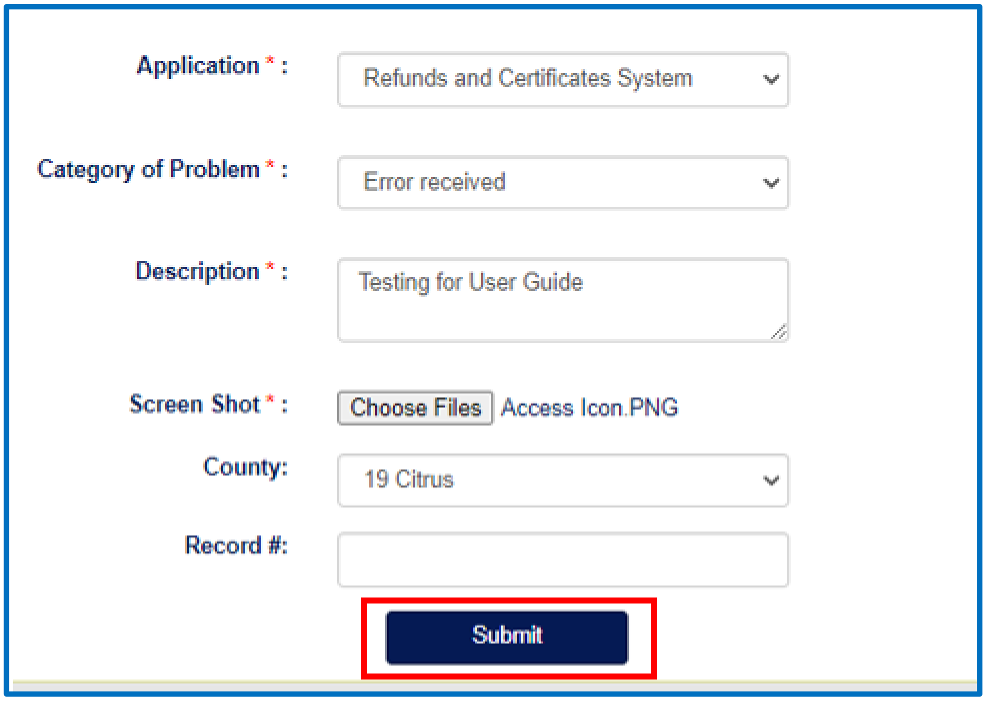
- Input the first and last name of the person experiencing the technical problem in the **Name** (**a**) field.
- Input the portal username of the person experiencing the technical problem in the **PTO Portal Username** (**b**) field.
- Input the email address of the person experiencing the technical 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.



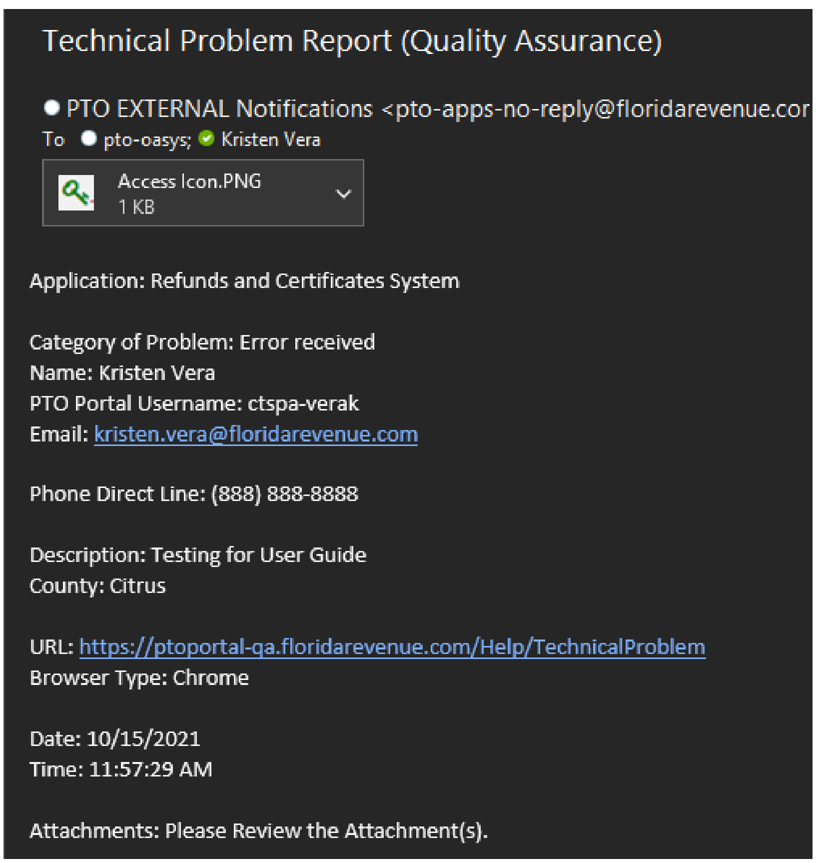

**12.3** Above these fields, you will notice two buttons.


- 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**.




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


Technical Problem Report (Quality Assurance)

PTO EXTERNAL Notifications <pto-apps-no-reply@floridarevenue.cor
To pto-oasys; Kristen Vera

Access Icon.PNG
1 KB

Application: Refunds and Certificates System

Category of Problem: Error received
Name: Kristen Vera
PTO Portal Username: ctspa-verak
Email: kristen.vera@floridarevenue.com

Phone Direct Line: (888) 888-8888

Description: Testing for User Guide
County: Citrus

URL: https://ptoportal-qa.floridarevenue.com/Help/TechnicalProblem
Browser Type: Chrome

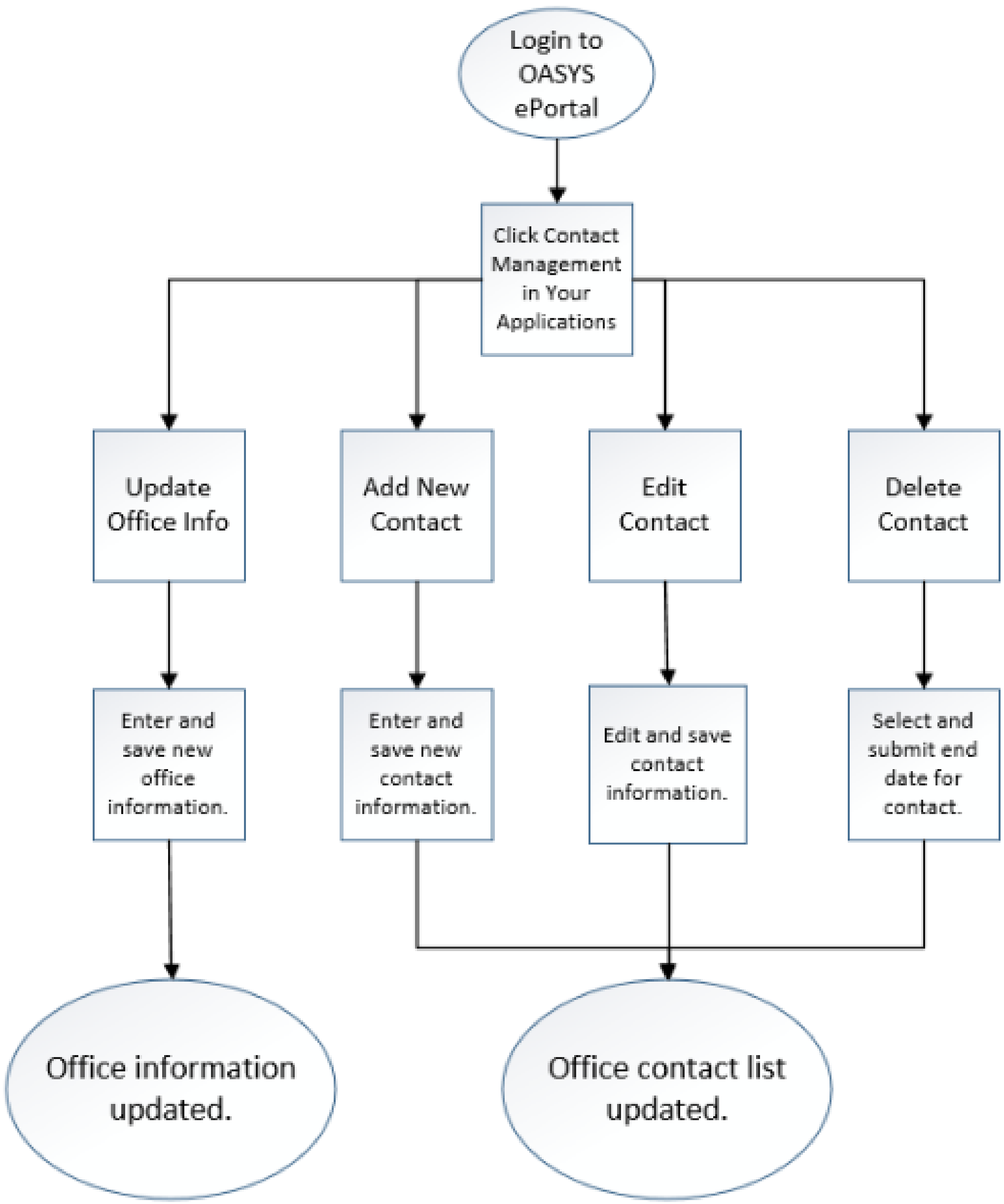
Date: 10/15/2021
Time: 11:57:29 AM

Attachments: Please Review the Attachment(s).

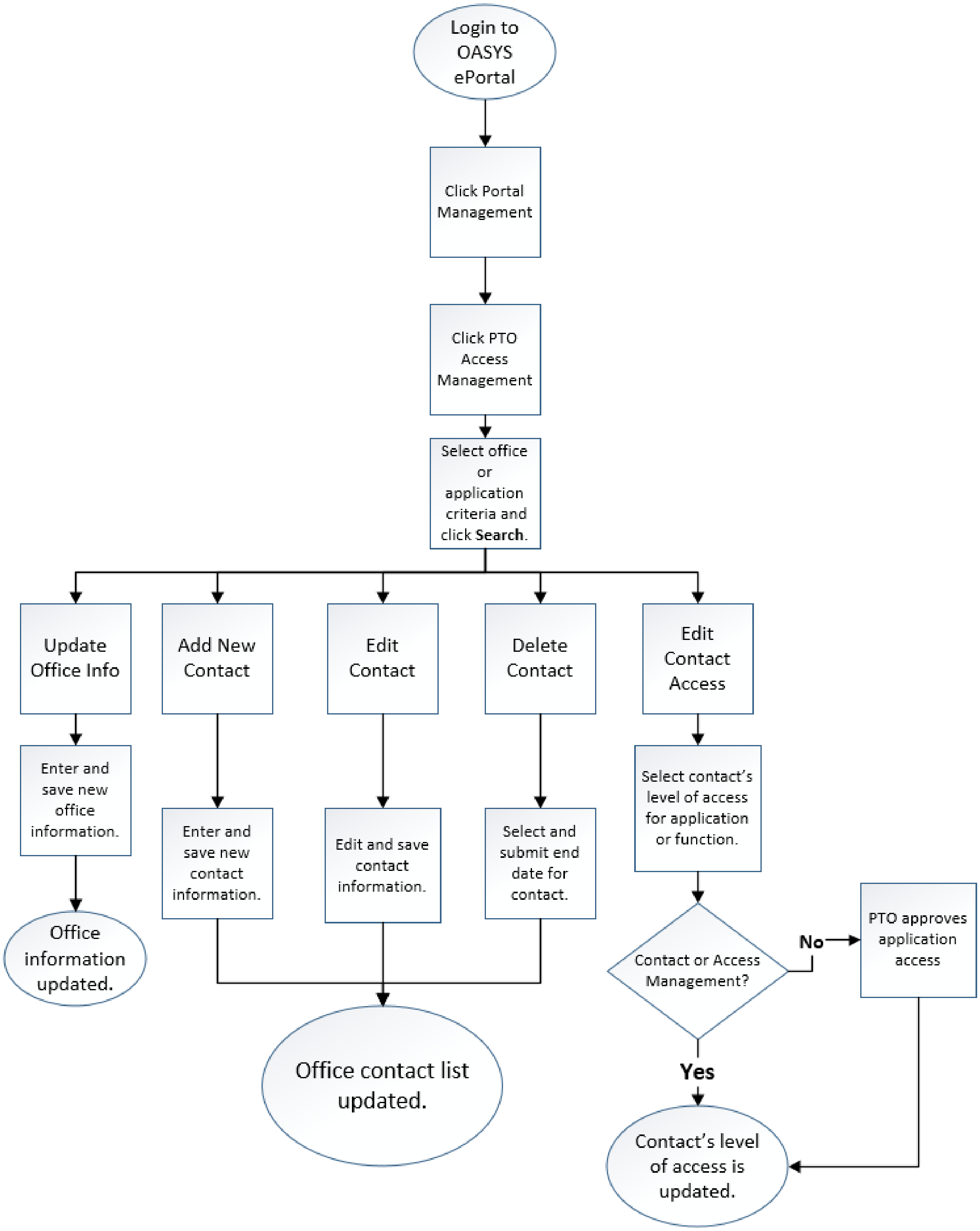
## 13. Contact and Access Management

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



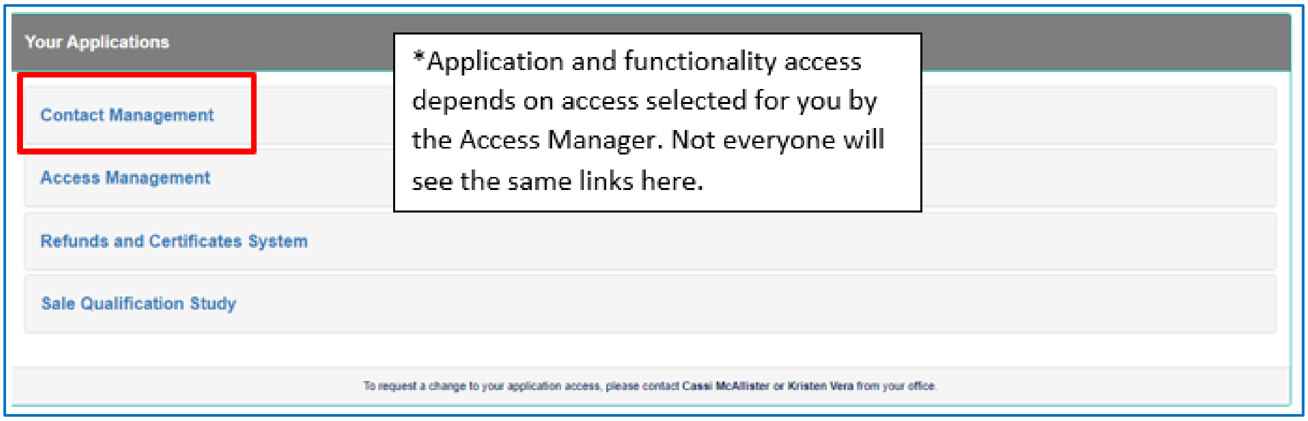
## Access Management



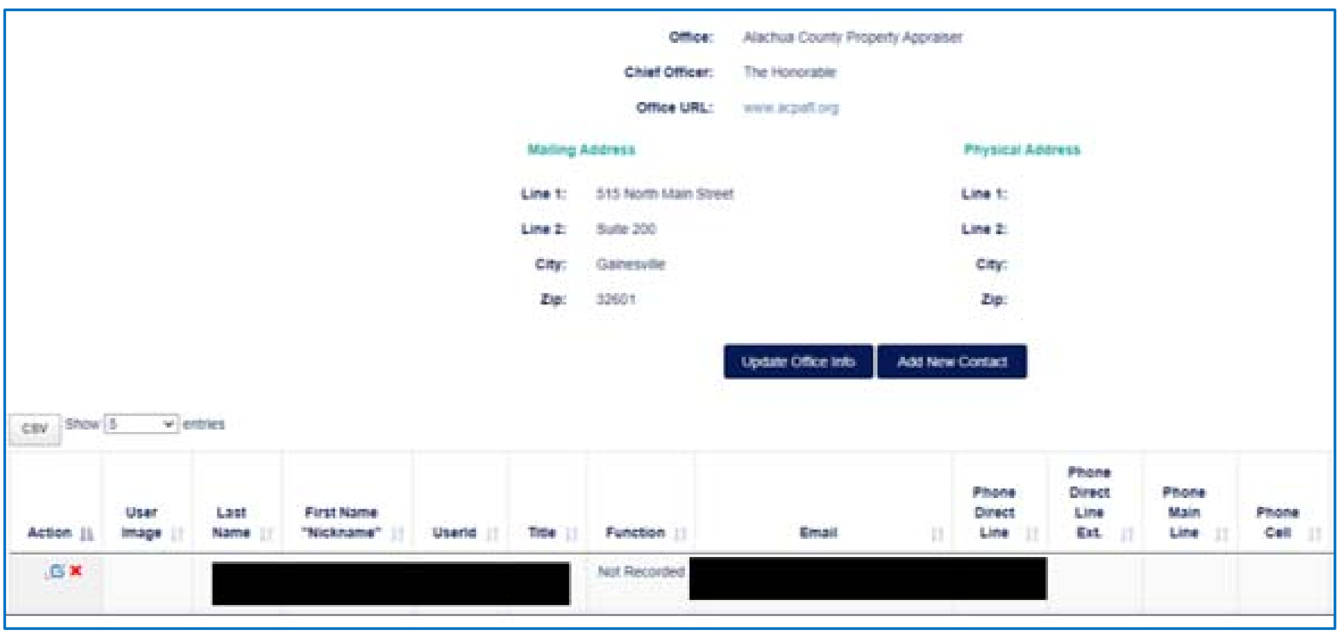
## 14. Contact Management

**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**.

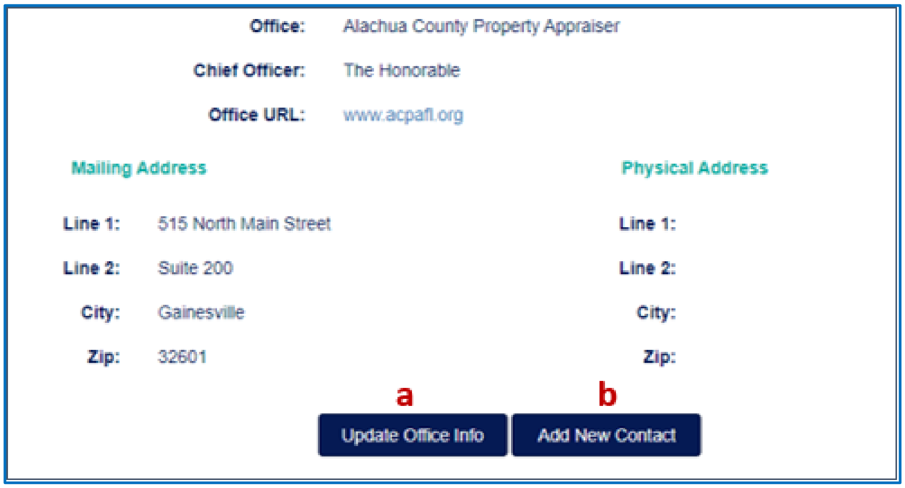



**14.3** You will arrive at the **Contact Management** screen. Here, you will see contact information for your office along with a data table containing the list of contacts. This data table can be exported to CSV and can be sorted on all columns.



**14.4** Beneath the office information, you will notice two buttons.

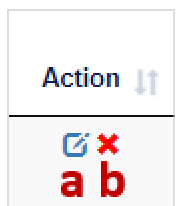
- Select **Update Office Info** (a) to update address information for a specific office.
- Select **Add New Contact** (b) to add a new contact to your office.




**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.



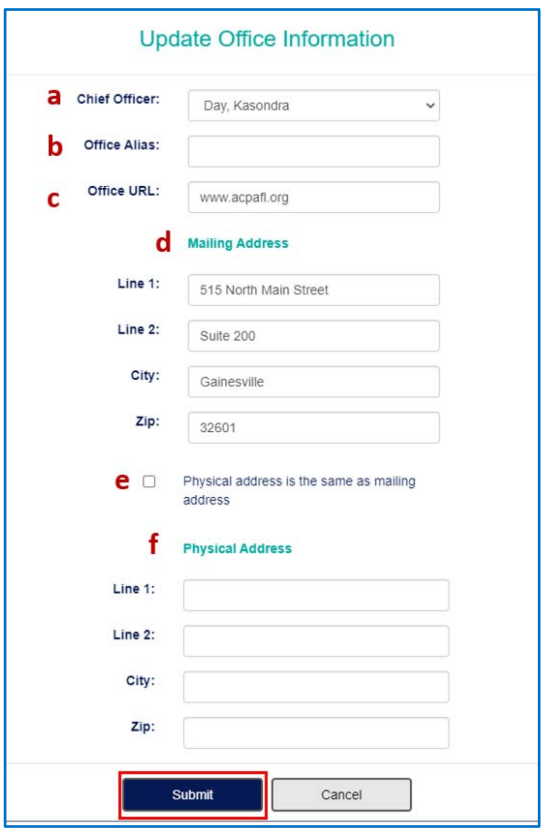

**14.6** It is important to note that only a few individuals in your office will have Contact Management capabilities. You should reach out to the Access Manager in your office to request any changes to your access.

## 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.

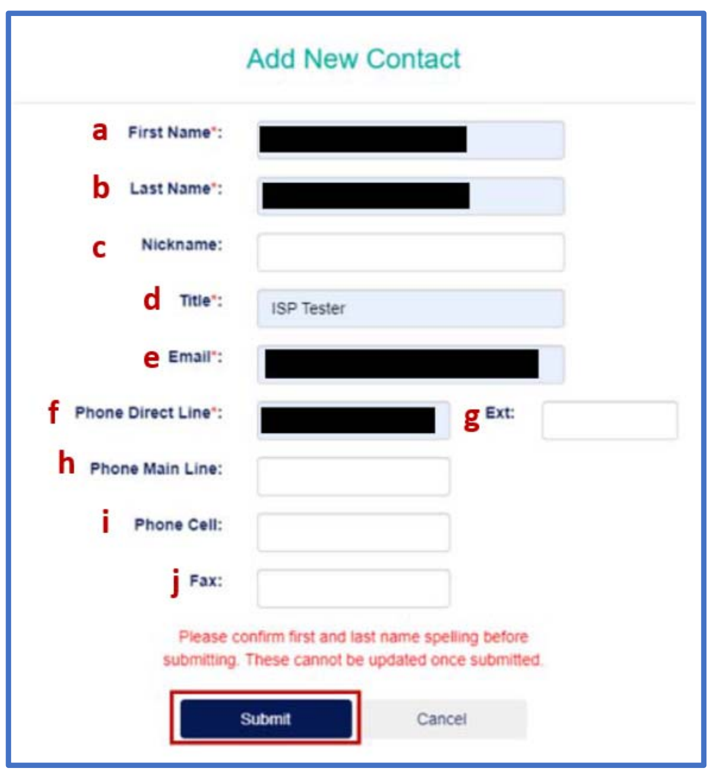
**15.2** You will arrive at the **Update Office Information** pop-up window shown below. Here, you will select or enter information for the following fields:

- 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**.

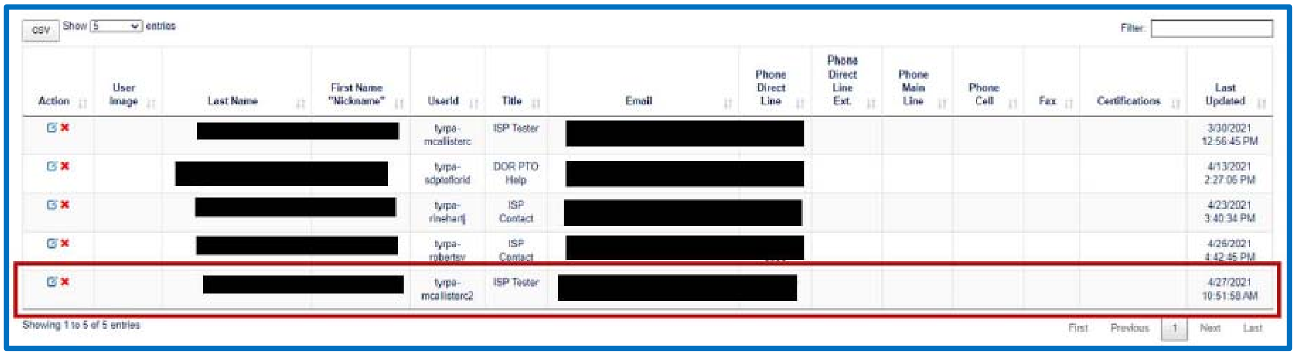


**15.3** If you wish to add a new contact, click **Add New Contact** on the **Contact Management** screen. You will arrive at the **Add New Contact** pop-up window. Here, you will enter information for the following fields:

- 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.



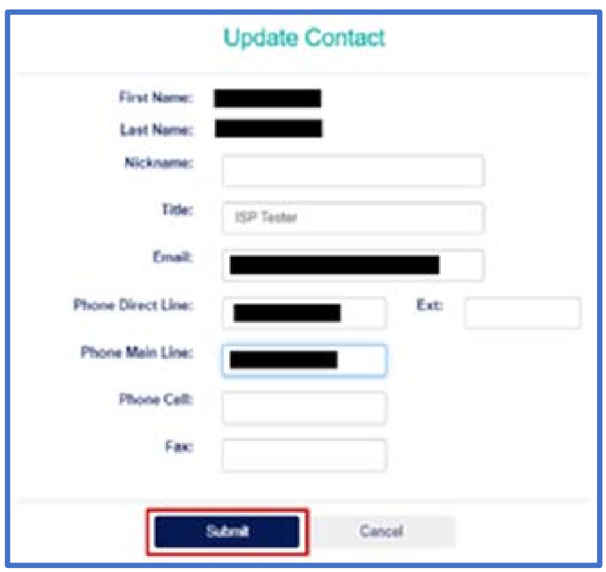
**15.4** After entering all appropriate information, click **Submit**. Once you click **Submit,** an email is sent to the new contact requesting that they complete their account setup. The **Contact Management** page will also update to show the newly added contact.



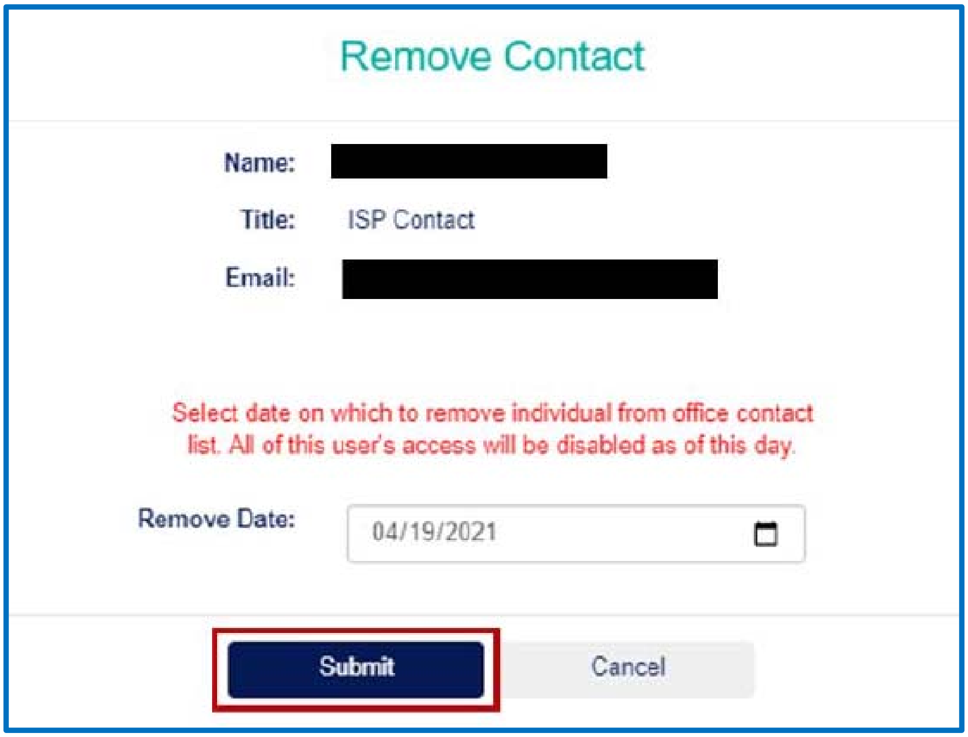

**15.5** If you wish to edit an existing contact, click the  **Edit** icon on the **Contact Management** page.

**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.



**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.




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

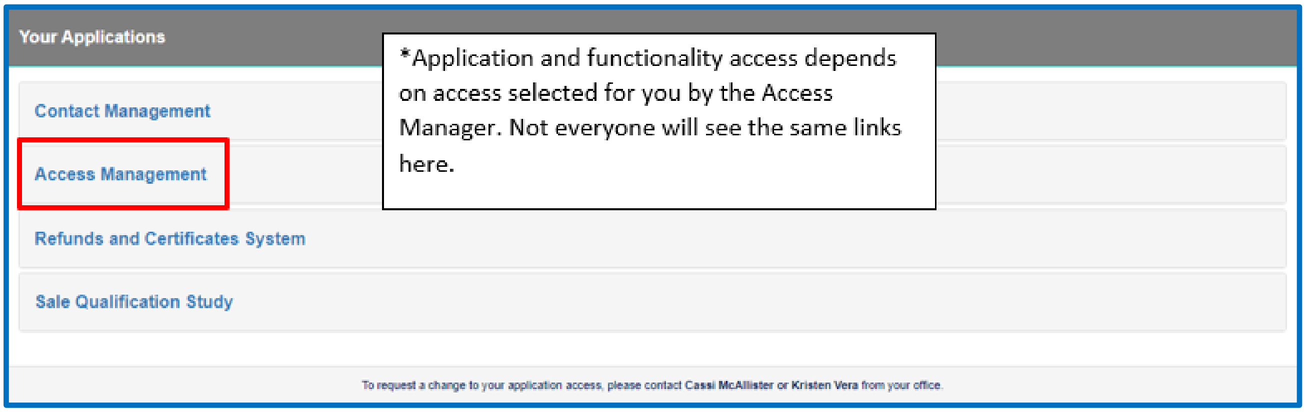

– The **Contact Management** page will update and no longer show the removed contact if the removal date has passed.

– The Contact Manager and Access Manager for your office should receive an email like the one below confirming that the contact has been removed.

## 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**.**




**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] | | | ISP Contact | Not Recorded | User Primary | | User Primary | View Only | User Primary | |
| | | [redacted] | | | Tester | Not Recorded | | | | | | |
| | | [redacted] | | | PTO Tester | Not Recorded | | | | | | |
| | | [redacted] | | | PTO Tester | Not Recorded | | | | View Only | | |
| | | [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

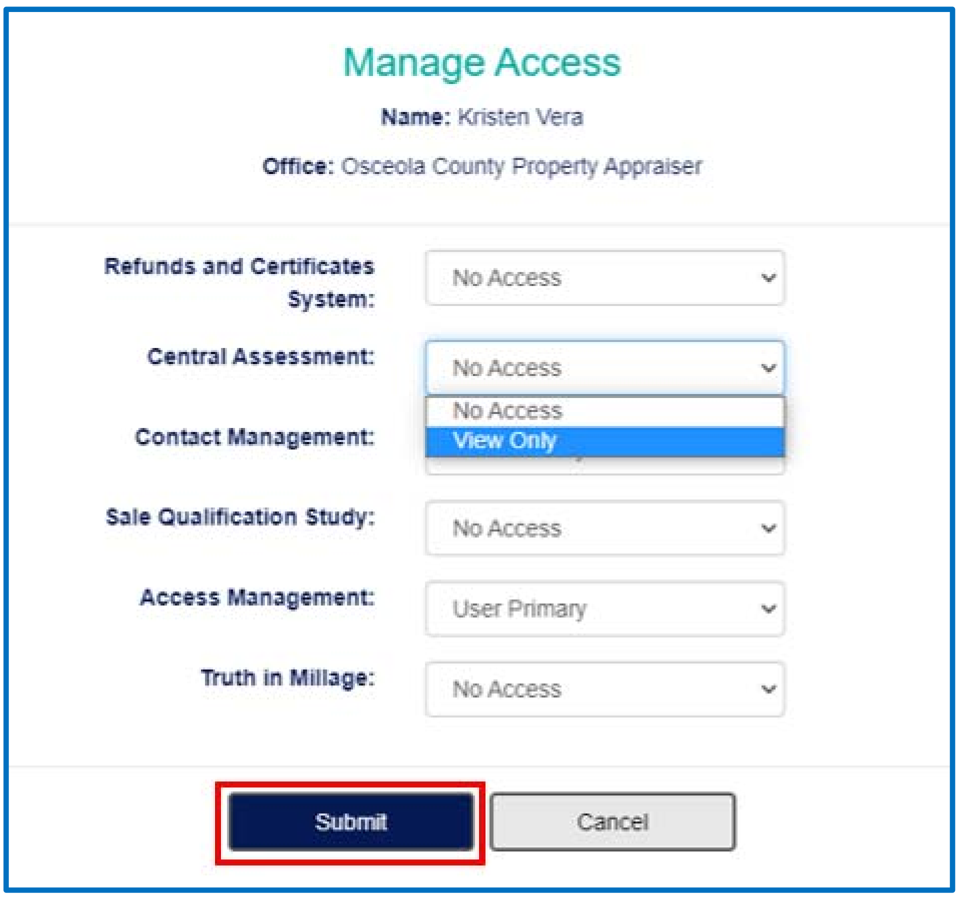
**17.1** If you wish to request access to an application for a contact, click the  **Access** icon on the **Access Management** screen next to that individual contact's name.

**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**.



**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.

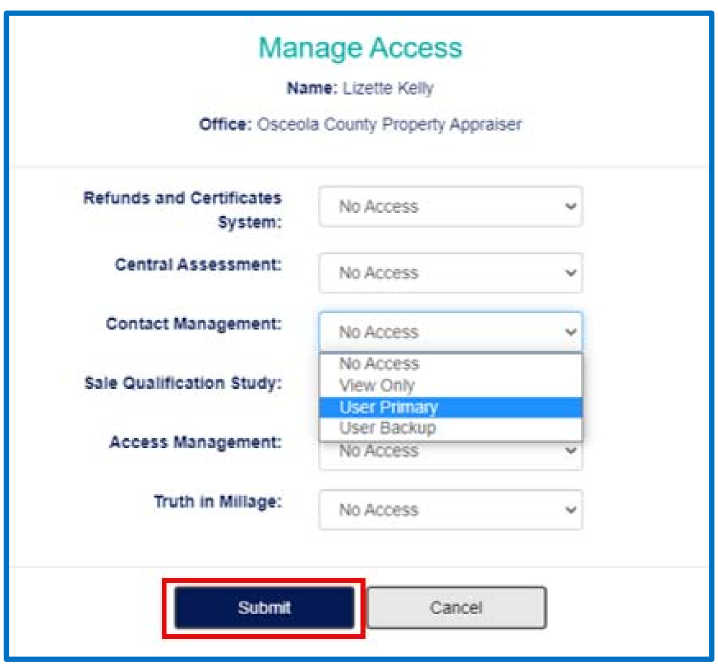
| Action | User Image | Last Name | First Name "Nickname" | Userid | Title | Function | Access Management | Central Assessment | Contact Management |
|---|---|---|---|---|---|---|---|---|---|
| | | Vera | Kristen "Kris" | oscpa-verak | PTO Contact | Not Recorded | User Primary | Requested: View Only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



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


**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.