Ministry of Municipal Affairs and Housing

Financial Information Return (FIR)

Smart FIR Municipal User Guide

Version 6.0

Final

Table of Contents

1   DOCUMENT HISTORY

Document History			
Version	**Date**	**Changed by**	**Description of changes**
1.0	February 2016	Al McLaren	Initial Draft
2.0	March 2016	Al McLaren	Final
3.0	November 2016	Owen Chandler	Update Final
4.0	December 2016	Royce Lee	Update Final
5.0	February 2023	Susan Martin	Updated for OPS BPS Secure
6.0	October 2025	Susan Martin	Updated – removal of "Attach Files" function.

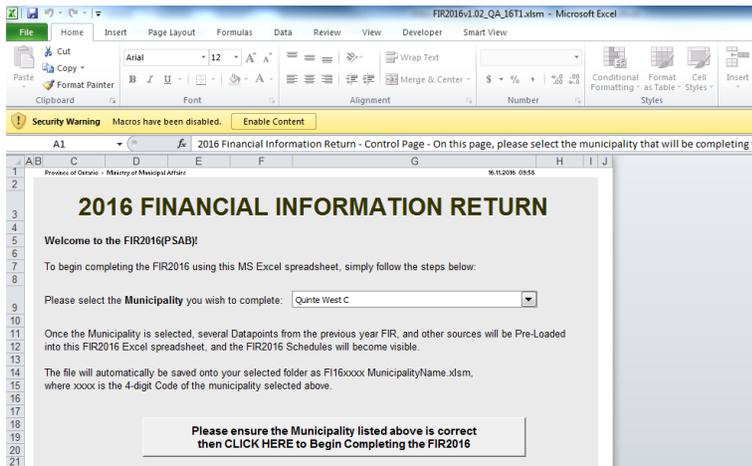# 2 MUNICIPAL USERS

2.1 INITIALIZE

Go to the FIR website.

https://efis.fma.csc.gov.on.ca/fir/index.php/en/financial-information-return-en/
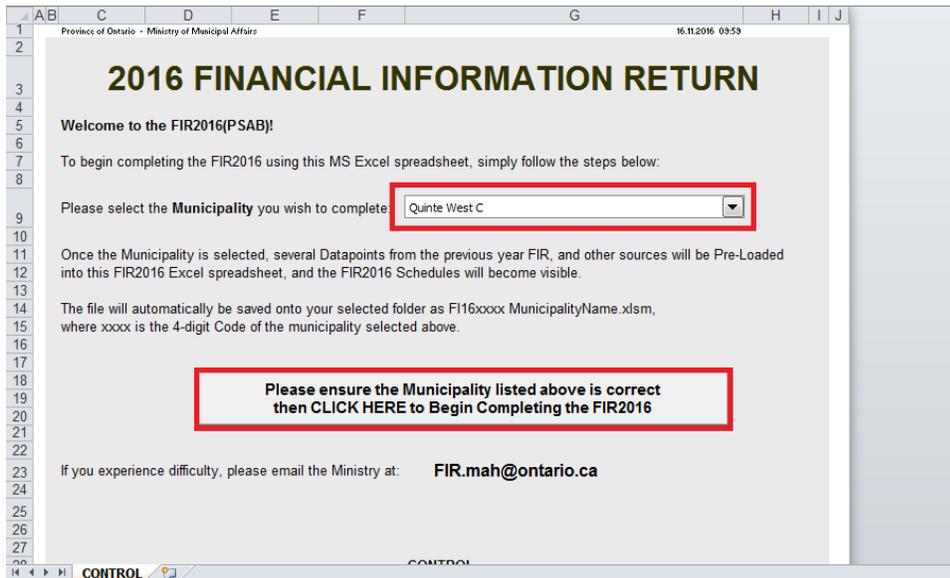
Download and save the Smart FIR to your computer.

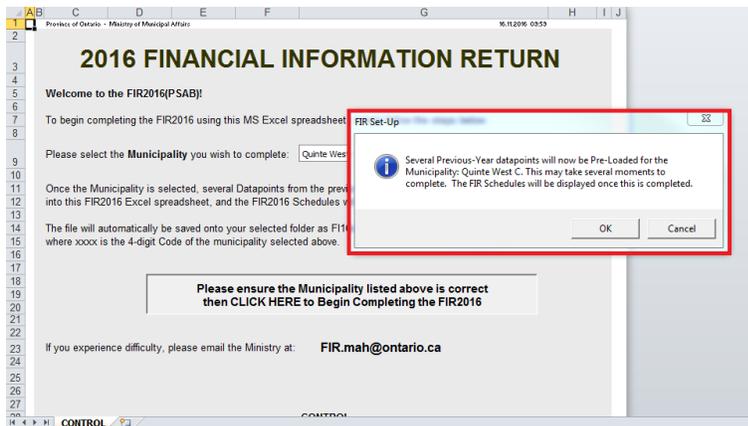Open the Smart FIR template. If the Security Warning is displayed select → **Enable Content**

The security warning box may appear, select → **Yes** to continue

Select your Municipality from the dropdown then select → **CLICK HERE** to begin button.
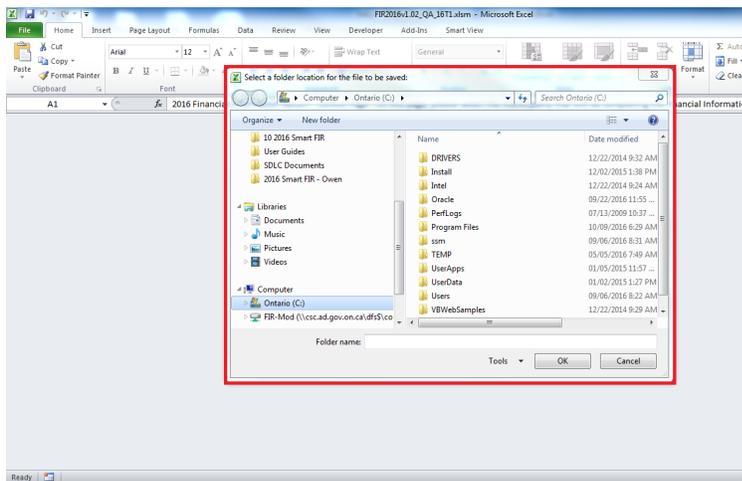

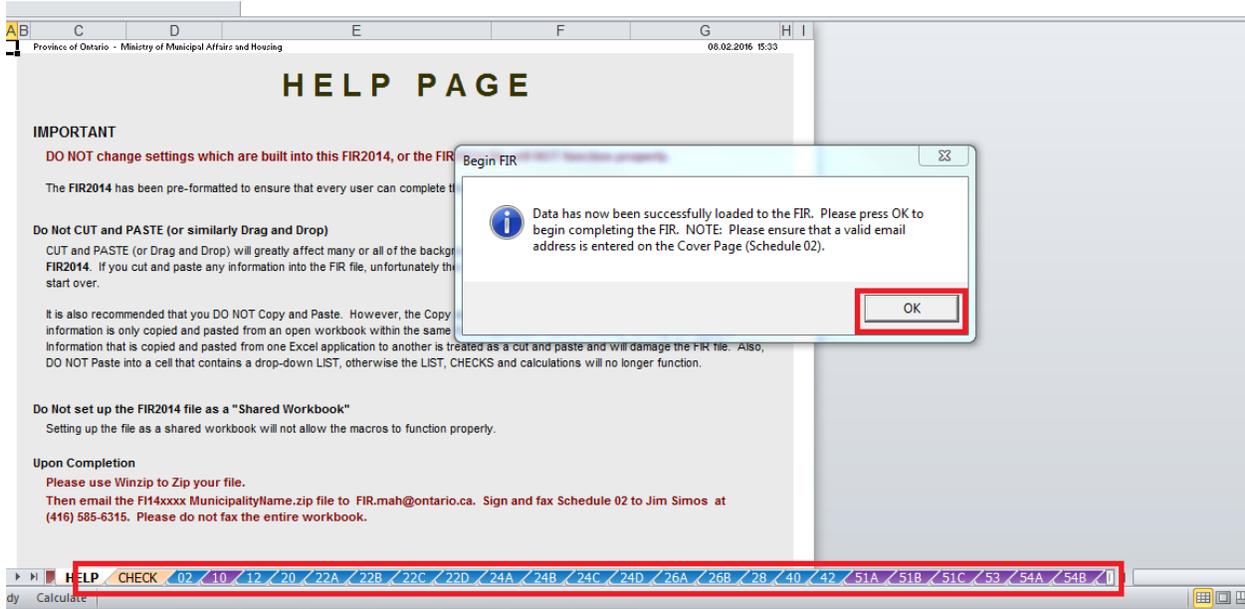The following message will be displayed, select → **OK**

The OPS BPS Secure login screen will be displayed. Enter your login credentials and select → **Login**

Select or create the folder you want to save the Smart FIR in and select → **OK**

This process may take around 2-3 minutes and Excel may display (not responding). This is expected Excel behaviour.

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The following message will be displayed, indicating the Smart FIR has successfully initialized. As well, the schedule tabs will be displayed. Select → **OK** to continue.
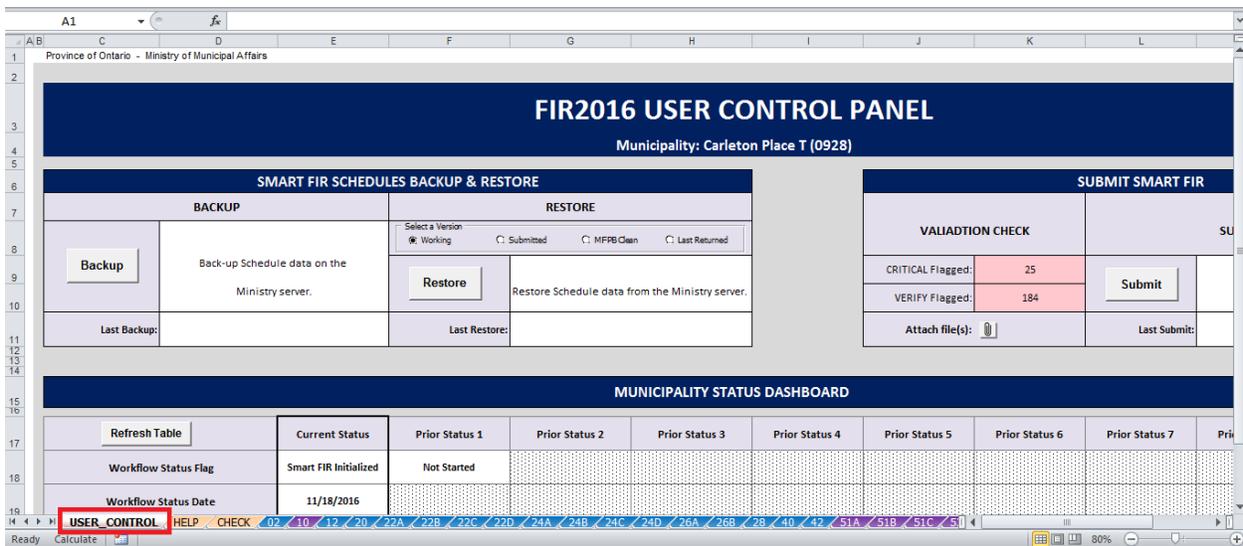

The Smart FIR is now ready for data entry, see Smart FIR Instruction for assistance in completing the forms.

If the Smart FIR has already been initialized by your Municipality the following message will be displayed. Please contact MFPB for assistance.
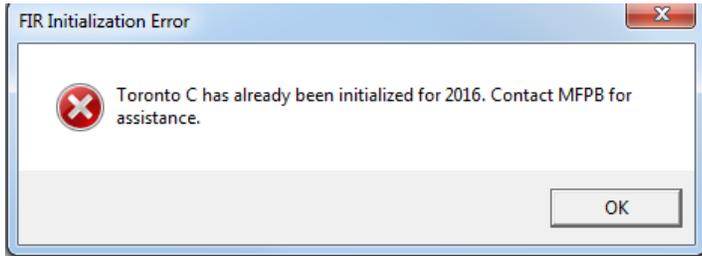

To access the User Controls to backup, restore and submit the Smart FIR select --> **USER CONTROL** tab.

2.2 BACKUP AND RESTORE

Users can back up the Smart FIR data to the server at any time prior to submitting it to the Ministry. Each time the data is backed up it replaces the data from the last backup. At any time, the user can restore the point in time backup, restoring the data from the server will overwrite any changes that have been made since the last backup.

To back up the data in the Smart FIR select → **Backup button**
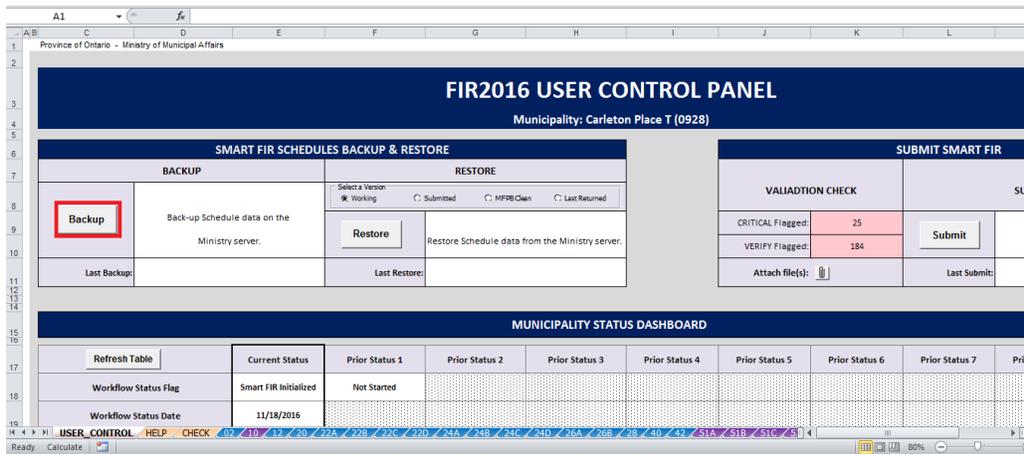
The following message will be displayed, select → **OK**
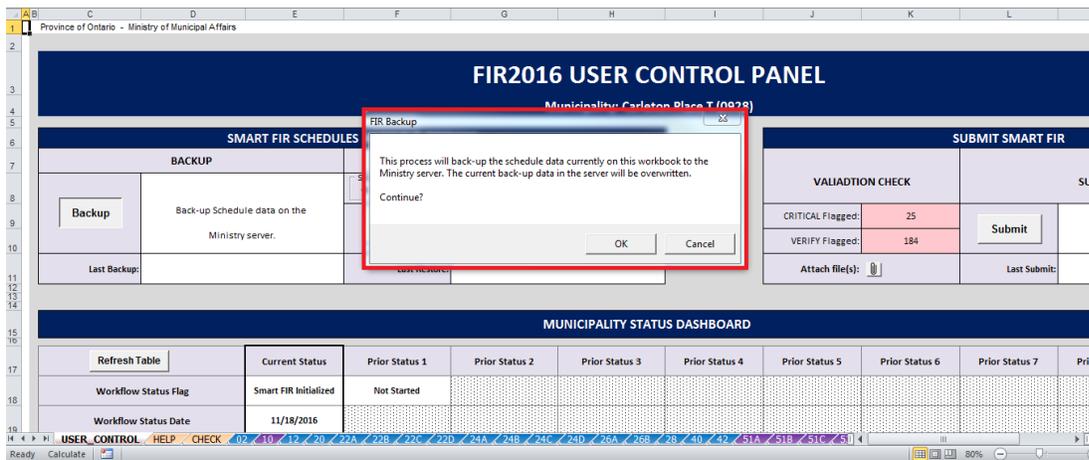
This process requires the use of the computer's clipboard. Close other open applications and do not perform Copy and Paste functions while running workflow action buttons.

The OPS BPS Secure Login screen will be displayed. Enter your login credentials and select →
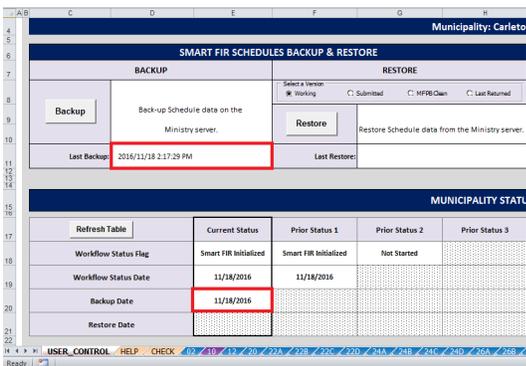*Login.*

This process may take around 2-3 minutes and Excel may display (not responding). This is expected Excel behaviour.
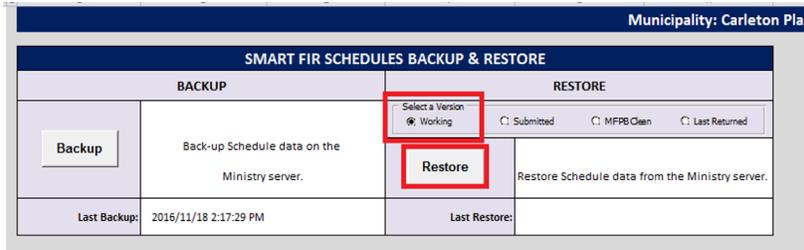
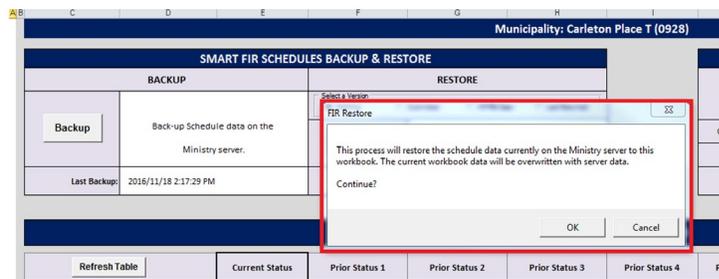The following message will be displayed, select → **OK** to continue
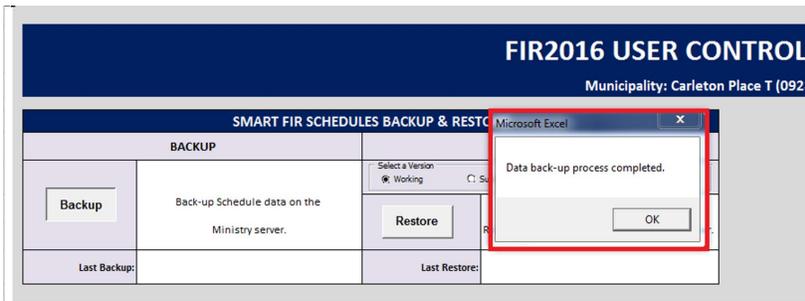
The status dashboard will be updated with the backup date; the dashboard will display the last 10 interactions with the Smart FIR server.

To restore data from the Smart FIR server, select➔ **Restore.** Data that has been backed up to the Smart FIR server will be copied to the Smart FIR, and changes that have been made to the Smart FIR since the last back up will be overwritten. Ensure the **Working Version** is selected.

The following message will be displayed select ➔ **OK** to continue

The OPS BPS Secure Login screen will be displayed enter your login credentials and select ➔ **Login.**
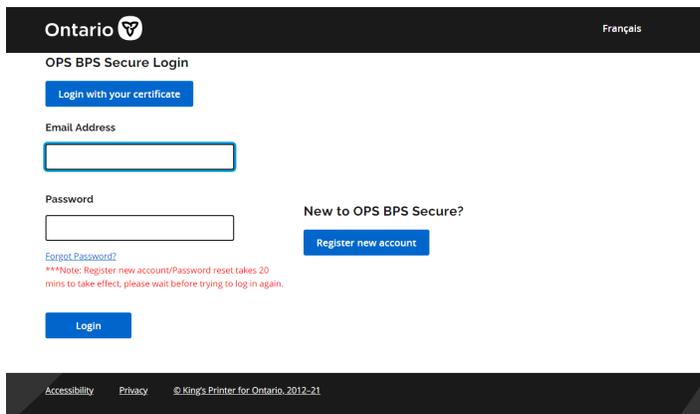
The following message will be displayed select ➔ **OK** to continue.
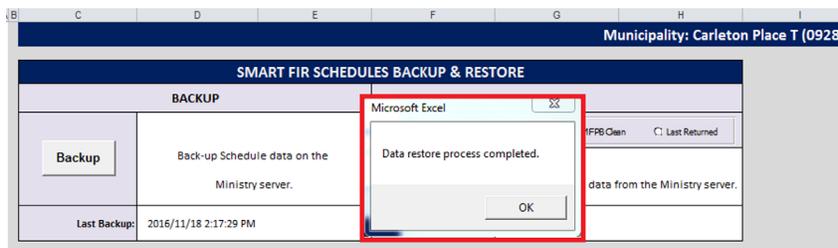
2.3 SUBMIT

Once the Smart FIR has been completed and all Verify and Critical Errors have been addressed, select → ***Submit.*** Results of the Check Tab will be displayed on the User Control panel. Return to the Check tab to address any outstanding issues.

The following message will be displayed select → ***OK*** to continue.

The OPS BPS Login screen will be displayed. Enter your login credentials and select → ***Login***

The Declaration of the Municipal Treasurer will be displayed, check the boxes to **acknowledge that:** and select → **OK**

The following message will be displayed, and the dashboard will be updated to **Submitted Under Review** select → **OK** to finish the Submission.

2.3.1 SUBMIT ERRORS

If there are unaddressed Verify or Critical Errors remaining on the Smart FIR the following message will be displayed, select → **OK** and return to the Smart FIR forms and correct the errors. If errors cannot be resolved contact MFPB.
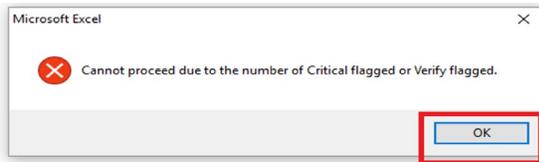
If the checkboxes on the Declaration are not checked, the following message will be displayed, select → **OK** and **check** the boxes
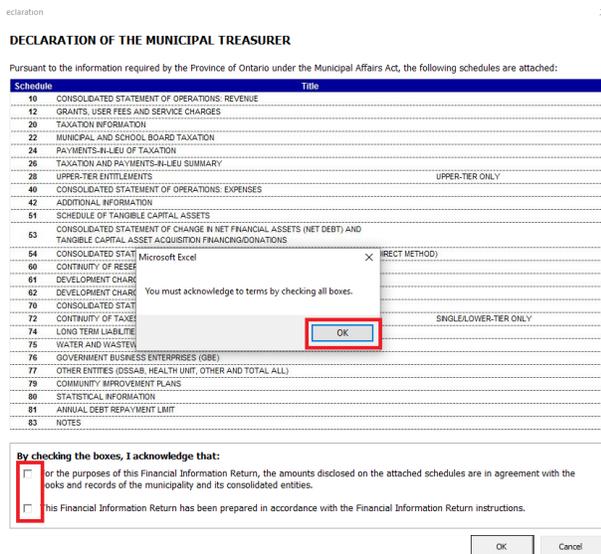
Once a Smart FIR has been submitted, a second submission is not allowed. If an attempt to submit is made, the following message will be displayed. Select→ **OK** to continue
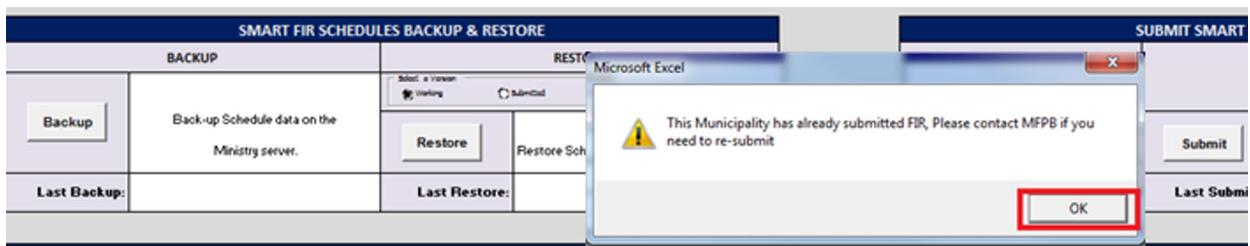
2.4 RETURNED SMART FIR

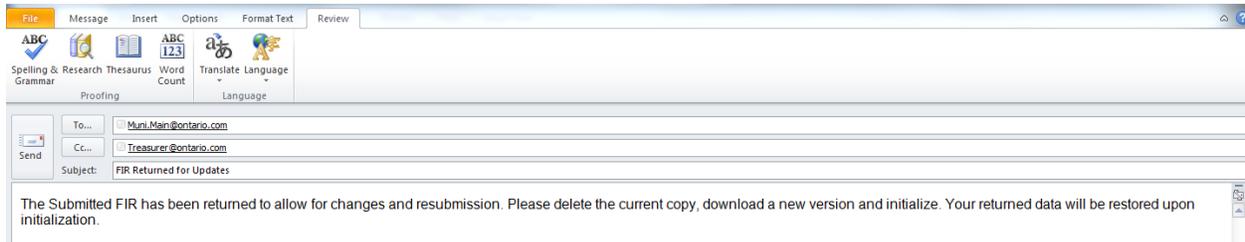MFPB may return a Smart FIR to the Municipality to allow for updates and resubmission. The municipality will receive the following email.

Delete the existing Smart FIR, download a **new** uninitialized version and follow the **steps in 2.1**. The newly initialized Smart FIR will contain the data that was submitted and any changes that have been made by MFPB.

Changes can now be made to the Smart FIR, Back-up, Restore and Submit processes as described in 2.2 – 2.3 are now available. Once the appropriate changes have been made the Smart FIR can be resubmitted.

2.5 VIEWING VERSIONS

Municipalities can restore various versions to the Smart FIR to be able to view the data. Data will be available based on the status of the Smart FIR

Prior to Submit:
- Working – the latest working version stored on the Smart FIR server

After Submit
- Working – the latest working version stored on the Smart FIR server
- Submitted – the submitted version
- MFPB Clean – the final version of the Smart FIR, will be empty prior to MFPB Clean Status
- Last returned – a copy of the data that was returned, will be empty prior to a return of the Smart FIR

To restore a version of the data, select the required version and select → *Restore*

The following message will be displayed select → *OK* to continue.

The OPS BPS Login screen will be displayed. Enter your login credentials and select → *Login*

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