MINISTRY OF MUNICIPAL AFFAIRS



Ministry of Municipal Affairs

Financial Information Returns (FIR)

Smart FIR Municipal User Guide

Version 3.0 Final

January 2017

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1 DOCUMENT HISTORY

Document History									
Version	Date	Changed by	Description of changes						
0.1	February 2016	Al McLaren	Initial Draft						
0.2	March 2016	Al McLaren	Final						
0.3	November 2016	Owen Chandler	Update Final						
1.0	December 2016	Royce Lee	Update Final						
2.0	January 2016	Al McLaren	Added insert Row						
3.0	February 2016	Al McLaren	Updated MFPB contact information						

2 MUNICIPAL USERS

2.1 INITIALIZE

Download and save Smart FIR to a local location. Open Smart FIR. If the Security Warning is displayed select → Enable Content



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

several Datapoints from the previous ye et, and the FIR2014 Schedules will bec	ear FIR, and other sources will be Pre-Loaded come visible.
onto your selected folder as FI14xxx ity selected above.	Security Warning Image: Security Warning Image: Security Warning Image: Security Warning Image: Security
Please ensure the Municipality I then CLICK HERE to Begin Co email the Ministry at: FIR.mahe	This file is on a network location. Other users who have access to this network location may be able to tamper with this file. What's the risk? Do not ask me again for network files Yes Bornamo.com
CONTROL Year 2014 E Municipality Addinaton Highla	ands To
Mun Asmt Code 1134	

Select Municipality from the dropdown then select \rightarrow **CLICK HERE** to begin button.

ABCDEFGHIJ	
1 Province of Datario - Ministry of Municipal Affairs 16.11.2016 03:53	
2	
2016 EINANCIAL INFORMATION BETURN	
4	
5 Welcome to the FIR2016(PSAB)!	
6	
7 To begin completing the FIR2016 using this MS Excel spreadsheet, simply follow the steps below:	
8	
9 Please select the Municipality you wish to complete Quinte west C	
10	
11 Once the Municipality is selected, several Datapoints from the previous year FIR, and other sources will be Pre-Loaded	
12 into this FIR2016 Excel spreadsheet, and the FIR2016 Schedules will become visible.	
13	
14 The file will automatically be saved onto your selected folder as FI16xxxx MunicipalityName.xlsm,	
15 where xxxx is the 4-digit Code of the municipality selected above.	
16	
17	
18 Please ensure the Municipality listed above is correct	
19 then CI LCK HEPE to Begin Completing the EIP2016	
21	
22	
23 If you experience difficulty, please email the Ministry at: FIR.mah@ontario.ca	
24	
25	
26	
27	

The following message will be displayed, select \rightarrow **OK**

A B	B C D E F G H I J
10	Province of Oktario - Ministry of Municipal Alfairs 96.112016-0353
2	
	2016 FINANCIAL INFORMATION RETURN
3	
4	Well-serve to the EID2042(DEAD)
6	welcome to the FIRZUTO(PSAD):
7	To begin completing the FIP2016 using this MS Excel spreadsheat
8	To begin compressing the need to damig this the Exect spreadonest in Set-Op
-	
9	Please select the Municipality you wish to complete: Quinte Wes Several Previous-Year datapoints will now be Pre-Loaded for the
10	Municipality: Quinte West C. This may take several moments to
11	Once the Municipality is selected, several Datapoints from the previous complete. The FIR Schedules will be displayed once this is completed.
12	into this FIR2016 Excel spreadsheet, and the FIR2016 Schedules v
13	
14	The file will automatically be saved onto your selected folder as FI1 OK Cancel
15	where xxxx is the 4-digit Code of the municipality selected above.
16	
17	
19	Please ensure the Municipality listed above is correct
20	then CLICK HERE to Begin Completing the FIR2016
21	
22	
23	If you experience difficulty, please email the Ministry at: FIR.mah@ontario.ca
24	
25	
26	
27	
14 € ≯	H CONTROL 2

MINISTRY OF MUNICIPAL AFFAIRS

The GO-Secure login screen will be displayed. Enter your login credentials and select → Sign In

A	C D E	G H I J
1	Province of Ontario - Ministry of Municipal Affairs	Login 🛛 🔤
2		
		· · · · · · · · · · · · · · · · · · ·
3	ZUTUTINANCIA	
4		
5	Welcome to the FIR2016(PSAB)!	
6		GO Secure ID :
7	To begin completing the FIR2016 using this MS	
8		Or, if you have a PKI certificate:
	Please select the Municipality you wish to com	Password :
9	risase coloci ne manopanty you mon to con	Log in with PKI
10		
11	Once the Municipality is selected, several Datap	Sign In
12	into this FIR2016 Excel spreadsheet, and the FIF	
13		Fornot your ID or password?
14	The file will automatically be saved onto your sel	roiger jear ib er pacementa i
15	where xxxx is the 4-digit Code of the municipality	Don't have a GO Secure account? Register
16		Now.
1/		
10	Please ensu	
20	then CLICK	
21	1	© OUISEN'S DRINTED FOR ONTABLO 2012-12 LENV TO- UNT
22		LAST MODIFIED: 2012-13 [ENVID: 0A1
23	If you experience difficulty, please email the Mini	
24		
25		II 4
20		Const
27		Caricer
20		CONTROL
4 - 4 - 1+	M CONTROL 2	

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



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, indicating the Smart FIR has successfully initialized. As well the schedule tabs will be displayed. Select \rightarrow **OK** to continue.

AB C D E	F G H I
HELP PA	A G E
IMPORTANT	
DO NOT change settings which are built into this FIR2014, or the FIR	Begin FIR 🛛 🔀
The FIR2014 has been pre-formatted to ensure that every user can complete t	
Do llot CUT and PASTE (or similarly Drag and Drop) CUT and PASTE (or Drag and Drop) will greatly affect many or all of the backgr FIR2014. If you cut and paste any information into the FIR file, unfortunately the	Data has now been successfully loaded to the FIR. Please press OK to begin completing the FIR. NOTE: Please ensure that a valid email address is entered on the Cover Page (Schedule 02).
t is also over. It is also recommended that you DO NOT Copy and Paste. However, the Copy information is only copied and pasted from an open workbook within the same Information that is copied and pasted from one Excel application to another is treat DO NOT Paste into a cell that contains a drop-down LIST, otherwise the LIST, CH	OK ated as a cut and paste and will damage the FR Tile. Also, HECKS and calculations will no longer function.
Do Not set up the FIR2014 file as a "Shared Workbook"	
Setting up the file as a shared workbook will not allow the macros to function pro	roperly.
Upon Completion Please use Winzip to Zip your file. Then email the FI4xxxx MunicipalityName.zip file to FIR.mah@ontario.c (416) 585-6315. Please do not fax the entire workbook.	ca. Sign and fax Schedule 02 to Jim Simos at
H H H H H CHECK	D / 24A / 24B / 24C / 24D / 26A / 26B / 28 / 40 / 42 / 51A / 51B / 51C / 53 / 54A / 54B / D

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 at FIR.MAH@ontario.ca for assistance.

FIR Initializ	ation Error	X
8	Toronto C has already been initialized for 2016. Contact MFP assistance.	B for
		ОК

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

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	FIR2016 USER CONTROL PANEL												
3													
4						IVI	unicipality: Carleto	on Place I (0928)					
6			SN	IART FIR SCHEDUI	ES BACKUP & RES	TORE				S	UBMIT SMART F	IR	
7			BACKUP			RESTORE							
8		1			Select a Version Working C	Submitted C MFPB Clea	in C Last Returned		VALIADTIC	DN CHECK		su	
9	Backup		Back-up Schedu	le data on the	Restore Restore Schedule data from the Ministry server.				CRITICAL Flagged:	25			
10			Ministry	y server.					VERIFY Flagged:	184	Submit		
11	Last Ba	ackup:			Last Restore:				Attach file(s):		Last Submit	:	
12 13 14													
15						M	UNICIPALITY STATE	US DASHBOARD					
17	Ref	resh Table		Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Prie	
18	Workflow Status Flag		Smart FIR Initialized	Not Started									
19	Work	kflow Status	Date	11/18/2016		0 / 244 / 246 / 246			ZEND ZENC ZEN				
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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 \rightarrow *Backup button*

	A1	(0	f _×									~		
AB	С		D	E	F	G	Н	I.	J	К	L			
1	Province of Ont	tario - Minie	stry of Municipal Affairs											
2														
	FIR2016 USER CONTROL PANEL													
3	Municipality: Carleton Place T (0928)													
5	SMART FIR SCHEDUIFS BACKUP & RESTORE													
7			BACKUP			RESTORE								
8		_			Select a Version © Working Cl Submitted Cl MFPB Clean Cl Last Returned				VALIADTIC	ON CHECK		su		
9	Backu	р	Back-up Schedu	le data on the	Restore Restore Schedule data from the Ministry server.			1	CRITICAL Flagged:	25				
10			Ministry	server.					VERIFY Flagged:	184	Submit			
11	Las	t Backup:			Last Restore:				Attach file(s):		Last Submit:			
12 13 14														
15						м	UNICIPALITY STATU	JS DASHBOARD						
17	F	Refresh Ta	ble	Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Pris		
18	Workflow Status Flag Smart FIR Initialize			Smart FIR Initialized	Not Started									
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H 4 ≯	USER_O	ONTROL	HELP CHECK		2A / 22B / 22C / 22	D <u> </u>	<u>/ 24D / 26A / 26B /</u>	28 / 40 / 42 / 51A	<u>∕518 ∕51C ∕5</u>		900V C			
Ready	Calculate	القنب									00%	Ð		

The following message will be displayed, select \rightarrow **OK**

FIR2016 USER CONTROL PANEL											
Municipality Carlaton Place T (10328)											
	SN	IART FIR SCHEDU	LES	lackup					S	UBMIT SMART FI	R
BACKUP			S Co	This process will back-up the schedule data currently on this workbook to the Ministry server. The current back-up data in the server will be overwritten.				VALIADTIC		:	
Backup	Back-up Schedu Ministry	le data on the				ОК	Cancel	CRITICAL Flagged: 25 VERIFY Flagged: 184		Submit	
Last Backup:				Lust nestore.				Attach file(s):		Last Submit:	
					м	UNICIPALITY STATU	JS DASHBOARD				
RefreshT	able	Current Status	Prior	Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	F
Workflow Status Flag Sr		Smart FIR Initialized	Not	Started							
	Workflow Status Date 11/18/2016										1

Tip

This process requires the use of the computers clipboard. Close other open applications and do not perform Copy and Paste functions while running workflow action buttons.

MINISTRY OF MUNICIPAL AFFAIRS

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1	Province of Ontario - Ministry of Municipal Affairs	.ogin	_			
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6	SMAR1	Or, if you have a PKI certificate:		S	UBMIT SMART FIR	R
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8		Sign In				=
	Backup Back-up Schedule da			zed: 25		
9		Forgot your ID or password?			Submit	
10	winistry serv			ged: 184		
		Don't have a GO Secure account? Register				
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The GO-Secure login screen will be displayed. Enter your login credentials and select \rightarrow *Sign In*

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 \rightarrow **OK** to continue

A B Province	C e of Ontario - Mini	D stry of Municipal Affairs	E	F	G	н	1	J	К	L	
					FIR2016	5 USER CO	ONTROL P	ANEL			
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The status dashboard will be updated with the backup date; the dashboard will display the last 10 interactions with the Smart FIR server.

Smart FIR Admin

A B	С	D	E	F	G	Н
4					N	lunicipality: Carletor
6		SIV	ART FIR SCHEDU	LES BACKUP & RES	TORE	
7		BACKUP			RESTORE	
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0	Backup	Back-up Schedu	le data on the			
9		Ministry	server.	Restore	Restore Schedule data	from the Ministry server.
10	Last Backup	2016/11/18 2·17·29 PM		Last Restore		
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17	Refresh T	able	Current Status	Prior Status 1	Prior Status 2	Prior Status 3
18	Workflow	Status Flag	Smart FIR Initialized	Smart FIR Initialized	Not Started	
19	Workflow	Status Date	11/18/2016	11/18/2016		
20	Backu	p Date	11/18/2016			
21	Restor	e Date				
22	USER CONTROL	HELP CHECK		22A 🗸 22B 🔏 22C 🖌 22	D 🗸 24A 🔏 24B 🔏 24C	24D 26A 26B
Ready						

To restore data from the Smart FIR server select \rightarrow *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.

AB	С	D	E	F	G	Н	1 I I I I I I I I I I I I I I I I I I I	J	K	L	
L					r	Municipality: Carleto	n Place T (0928)				
Г		SN	IART FIR SCHEDU	LES BACKUP & RES	STORE				S	UBMIT SMART FI	R
		BACKUP			RESTORE						
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ady	<u></u>									80% 🕞 🖳 🖓	+

The following message will be displayed select $\rightarrow OK$ to continue

The GO-Secure login screen will be displayed enter your login credentials and select \rightarrow *Sign In*

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	SMAR		*		SUBMIT SMART FIR
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		Forgot your ID or password?			
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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 select $\rightarrow OK$ to continue.

The status dashboard will be updated with the backup date and the dashboard will display the last 10 interactions with the Smart FIR server.

2.3 ATTACH FILES

Municipalities may attach files to be submitted with the Smart FIR data. To attach a file select \rightarrow **Attach files(s) icon.** Files may be attached after the Smart FIR has been submitted.

Province of Ontario - Minis	try of Municipal Affairs									
				FIR2016	USER CC	NTROL P	ANEL			
	SIV	ART FIR SCHEDU	LES BACKUP & REST	TORE				S	UBMIT SMART FI	R
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Backup	Back-up Schedu Ministry	le data on the server.	Restore	Restore Schedule data fr	om the Ministry server.		CRITICAL Flagged: VERIFY Flagged:	25 184	Submit	
Last Backup:			Last Restore:	2016/11/18 3:14:02 PM			Attach file(s)	0	Last Submit:	
				ML	INICIPALITY STATU	IS DASHBOARD				
Refresh Ta	ble	Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Prie
Workflow S	tatus Flag	Smart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Not Started					
Workflow St	tatus Date	11/18/2016	11/18/2016	11/18/2016						
USER_CONTROL	HELP CHECK		22A 🗶 22B 🗶 22C 🗶 22I	D 🗶 24A 🗶 24B 🗶 24C 📈	24D <u>26</u> A <u>26</u> B <u></u>	28 / 40 / 42 / 51A	<u> 518 / 51C / 51</u>		2007	

The GO-Secure login screen will be displayed. Enter your login credentials and select \rightarrow *Sign In*

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	Forgot your ID or password?					
	Don't have a GO Secure account? Register Now.		E	_		
ble c					Prior Status 6	Prior Status 7
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atus Date	LAS	TMODIFIED: 2016-11-02 21:41:59				
Date			-			
			•			
Date			Cancel			
	SMART BACKUP Back-up Schedule da Ministry serve 2016/11/18 2:17:29 PM 2016 cm 2016 cm	SMART BACKUP GO Secure ID : GO Secure ID : Control of the secure in the	SMART GO Secure ID : Back-up Schedule das Ministry seve Or, if you have a PKI certificate: 2016/11/18 2:17:29 PM Password : Construction Don't have a GO Secure account? Register Now. ble Construction catus Flag Sm atus Date Image: Construction Date Image: Construction	SMART BACKUP Back-up Schedule de Ministry serve Ministry serve Sign In Forgot your ID or password? Dot have a GO Secure account? Register Now. Ble Comparison of the secure account? Register Now. Comparison of the secure account? Register Now. Comparison of the secure account? Register Dote Comparison of the secure account? Register Comparison of the secure account? R	SMART BACKUP Back-up Schedule de Ministry sere Ministry sere Doit Or, if you have a PKI cettificate: Password: Log in with PKI Back-up Schedule de Ministry sere Sign In Forgot your ID or password? Don't have a GO Secure account? Register Now. Outer's PRINTER FOR ONTARIO, 2012-13 [ENV ID: UAT LAST MODIFIED. 2016-11-02 21:41:39 Date	SMART BACKUP Back-up Schedule de Ministry serve Ministry serve Doth have a GO Secure account? Register Doth have a GO Secure account? Register Now. Back Jack Date Date Date

The following dialog box will be displayed. Select \rightarrow *Attach* – *File* then browse to the file that is to be attached then select \rightarrow *OK*

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🔉 🥢 Attach		^
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	File Description	
		^
		OK Cancel

Select \rightarrow **Close** to complete file attachment

inked Reporting SchLine,Period	g Objects 1,2221,FY14,Scenario,Ve	rsion,SchLineBlock,SchCol		:
Type	Description	Reference	Created By	Last Modified
🗏 File		FIR UAT Guide.d	Mfpbuser +06@gmail	Sunday, February 14, 201
Hide Intersection	on			Close

To view or remove files that have been attached select the file attach ICON, login to Smart FIR. To remove an attached file, select the file and select $\rightarrow X$

🚯 🖉 Attach 🔻 🖌 🗙									
Туре	Description	Reference	Created By	Last Modified					
File		FIR UAT Guide.d	Mfpbuser +06@gmail	Sunday, February 14, 201					

2.4 SUBMIT

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

			FIR2016 USER CO Municipality: Carleto	NTROL P	ANEL	
	SMART FIR SCHEDU	LES BACKUP & REST	ORE			SUBMIT SMART FIR
	BACKUP		RESTORE			
		Select a Version	Submitted C MFPB Clean C Last Returned		VALIADTION CHECK	SU
Backup	Back-up Schedule data on the Ministry server.	Restore	Restore Schedule data from the Ministry server.		CRITICAL Flagged: 0 VERIFY Flagged: 0	Submit
Last Backup:		Last Restore:	2016/11/18 3:14:02 PM		Attach file(s):	Last Submit:

The following message will be displayed select $\rightarrow OK$ to continue.



The GO-Secure login screen will be displayed. Enter your login credentials and select → *Sign In*

Format Painter	B I U - Fo	nt	A - E =	:= ##	Merge & (Center - \$	• % • .00 .00 .00 ⇒.0	Conditional Formatting × a	Format Cell	Insert Del	ete F	ormat 2
C ovince of Ontario - Min	istry of Municipal Affair	E rs and Housing MART FIR SCE	GO Secu Passwor	d : Sign In			Or, if you have a P Log in with f	KI certificate: P KI			•	L MIT SMA
F 3kp FIR Version Check Backup Last Backup:	Back-up Scheduk se	e data on the Minis rver.	Forgot yo Don't hav Now.	ur ID or passw e a GO Secure	rord? • account? Regi	ster					E	Submit Last Su
						© QUEEN'S PF	RINTER FOR ONTARI LAST MODIF	I <mark>O, 2012-13</mark> El IED: 2015-11-0	W ID: UAT 5 21:51:56		Ļ	
Refresh T Workflow St	able atus Flag	Current Statu Smart FIR Initialized] <				II	1		► Cancel		Prior Status
Workflow Sta Backup I	atus Date Date	02/08/2016	02/0	8/2016								

_____ja

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

hedul	ule Ti	tle
10	CONSOLIDATED STATEMENT OF OPERATIONS: REVENUE	
12	GRANTS, USER FEES AND SERVICE CHARGES	
20	TAXATION INFORMATION	
22	MUNICIPAL AND SCHOOL BOARD TAXATION	
24	PAYMENTS-IN-LIEU OF TAXATION	
26	TAXATION AND PAYMENTS-IN-LIEU SUMMARY	
28	UPPER-TIER ENTITLEMENTS	UPPER-TIER ONLY
40	CONSOLIDATED STATEMENT OF OPERATIONS: EXPENSES	
42	ADDITIONAL INFORMATION	
51	SCHEDULE OF TANGIBLE CAPITAL ASSETS	
53	CONSOLIDATED STATEMENT OF CHANGE IN NET FINANCIAL ASSETS (N TANGIBLE CAPITAL ASSET ACQUISITION FINANCING/DONATIONS	IET DEBT) AND
54	CONSOLIDATED STATEMENT OF CASH FLOW (SE	LECT DIRECT OR INDIRECT METHOD)
60	CONTINUITY OF RESERVES AND RESERVE FUNDS	
61	DEVELOPMENT CHARGES RESERVE FUNDS	· · · · · · · · · · · · · · · · · · ·
62	DEVELOPMENT CHARGES RATES (INCLUDING SPECIAL AREAS)	-
70	CONSOLIDATED STATEMENT OF FINANCIAL POSITION	
72	CONTINUITY OF TAXES RECEIVABLE	SINGLE/LOWER-TIER ONLY
74	LONG TERM LIABILITIES AND COMMITMENTS	
75	WATER AND WASTEWATER	
76	GOVERNMENT BUSINESS ENTERPRISES (GBE)	
77	OTHER ENTITIES (DSSAB, HEALTH UNIT, OTHER AND TOTAL ALL)	
79	COMMUNITY IMPROVEMENT PLANS	
80	STATISTICAL INFORMATION	
81	ANNUAL DEBT REPAYMENT LIMIT	
83	NOTES	
v che Fo bo	ecking the boxes, I acknowledge that: For the purposes of this Financial Information Return, the amount books and records of the municipality and its consolidated entities This Financial Information Return has been prepared in accordance	is disclosed on the attached schedules are in agreement with the , ce with the Financial Information Return instructions.

he Attach Files

dialog box will be displayed, see section 2.3 above for details on how to attach files.

D	E	Linked Reporting O	bjects		-		×	L	N
BACKUP		SchLine,Period,4	331,FY14,Scenario,Ve	ersion,SchLineBlock,SchC	o				SUBN
Back-up Sched	lule data on the Ministry server.	🗟 🖉 Attach	• / ×					Submit	
2016/02	/17 4:27:03 PM	Туре	Description	Reference	Created By	Last Modified		Last Submit:	
le	Current Status							Prior Status 7	Prior S
us Flag	Smart FIR Initialized								
is Date	02/17/2016	Hido Internection							
te	02/17/2016					Close			
te	02/17/2016	02/17/2016							

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

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		BACKUP			RESTORE							
				Select a Version	bmitted C MFPB Clean	Clast Returned	C	VALIADTI			SUBMIT FIR	
	Backup	Back-up Schedu 1	lle data on the Ministry erver.	Restore	Restore Schedule data	a from the Ministry server.		FIR Submit process	completed.	Submit	Submit FIR :	Schedules.
	Last Backup:	2016/02	17 5:10:14 PM	Last Restore:	2016/02/1	7 4:12:18 PM				Last Submit:		
								[ОК			
						MUNICIPALITY STAT	US DASHBOA		J			
ſ	Refresh T	able	Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Prior Status 8	Prior Status
	Workflow Sta	atus Flag	Submitted Under Review	imart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Not Started				
	Workflow Sta	itus Date	02/17/2016	02/17/2016	02/17/2016	02/17/2016	02/17/2016					
	Backup [Date	02/17/2016	02/17/2016	02/17/2016							
	Restore	Date	02/17/2016	02/17/2016	02/17/2016	02/17/2016						
		_					_					_

2.4.1 SUBMIT ERRORS

If there are unaddressed Verify or Critical Errors remaining on the Smart FIR the following message will be displayed, select \rightarrow **OK** and return to the Smart FIR forms and correct the errors. If errors cannot be resolved contact the MFPB at FIR.MAH@ontario.ca for assistance.

Microsoft E	xcel	×
8	Cannot proceed due to the number of Critical flagged or V	erify flagged.
		ОК

If the checkboxes on the Declaration are not checked, the following message will be displayed, select \rightarrow **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 \rightarrow **OK** to continue

				FIR2016	USER CO	NTROL 6 × T (1805)	PANEL				
	SN	MART FIR SCHEDU	LES BACKUP & RES	TORE				5	UBMIT SMART FI	R	
Backup	BACKUP Back-up Schee	dule data on the	Solid a Varian	REST([®] Microso	ft Excel This Municipality h	as already submitte	d FIR, Please contact	MFPB if you		SUBMIT FIR	
Last Backup:	Ministry	y server.	Last Restore:	Restore Sch	need to re-submit			ок	Submit	Submit FIR	Schedules.
				M	UNICIPALITY STATU	S DASHBOARD					
Refresh T	able	Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status S	Prior Status 6	Prior Status 7	Prior Status 8	Prior Sitatus 9
Workflow S	itatus Flag	Submitted Under Review	imart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Not Started				
Workflow S	tatus Date	02/17/2016	02/17/2016	02/17/2016	02/17/2016	02/17/2016					
Backu	p Date	02/17/2016	02/17/2016	02/17/2016							
Restor	e Date	010000	00.000000	0704710040	0014710040						

2.5 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.

File	Message	e Insert	Options	Format Text	Review												^ ?
ABC	í		a az	Б 🎊													
Spelling Gramma	& Research	Thesaurus Wo Co	ord Trans	late Language													
	Proofi	ing		Language													
Send	To Cc	Muni.Maini	@ontario.co @ontario.co	<u>n</u>													
	Subject:	FIR Returned	i for Updat	es													
The	Submittee	d FIR has t	oeen ret	urned to allo	ow for cha	nges and resubmission	. Please delete	te the curre	ent copy, d	ownload a	new versio	on and initia	ize. Your ref	urned data v	vill be restor	ed upon	

Delete the existing Smart FIR, download a <u>**new**</u> uninitialized version and follow the <u>**steps in 2.1**</u>. 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 – 2.4 are now available. Once the appropriate changes have been made the Smart FIR can be resubmitted.

2.6 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 \rightarrow *Restore*

				EIP2016							
				FIRZUIO	USEN CU		ANEL				
					Municipality: Aj	ax T (1805)					
	SN	MART FIR SCHEDU	LES BACKUP & REST	ORE					SUBMIT SMART F	IR	
	BACKUP			RESTORE							
			Working C	Sonited CHIPS Dea	n Clast Returned		VALIADTI	ON CHECK		SUBMIT FIR	
Backup	Back-up Schee	dule data on the					CRITICAL Flagged	24			
	Ministry	perver.	Restore Schedule data from the Ministry server.				VERIFY Flagged	1	Submit	Submit FIR	Schedules.
Last Baokup:			Last Restore:				Attach file(s):	0	Last Submit:		
						4					
				M	UNICIPALITY STATU	IS DASHBOARD					
Refresh Ta	ble	Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Prior Status 8	Prior Statu
Workflow S	tatus Flag	Accepted Clean	Updated Under Review	Submitted Under Review	MFPB Working Restore	MFPB Working Restore	MFPB Working Restore	Updated Returned	Updated Under Review	Clean Re-Opened	Accepted C
Workflow S	tatus Date	11/14/2016 11/14/2016 11/14/2016 11/14/2016				11/14/2016	11/14/2016	11/14/2016	11/14/2016	11/14/2016	11/14/20
Backup	Date	11/14/2016	11/14/2016	11/14/2016	11/14/2016	11/14/2016	11/10/2016	11/10/2016	11/10/2016	11/10/2016	11/10/20
Restore	Date	11/10/2016	11/10/2016	11/10/2016	11/10/2016	11/10/2016	11/10/2016	11/10/2016	11/10/2016	11/10/2016	11/10/20

The following message will be displayed select $\rightarrow OK$ to continue.

Province of Ontario - Ministry of Municipal Affairs

				FIR2016	6 USER CC	ONTROL	PANEL			
				Μ	Iunicipality: Carleto	on Place T (0928)				
			FIR Restore			X				
	SN	IART FIR SCHEDUL	.ES					S	UBMIT SMART FI	R
	ВАСКИР		This process will r workbook. The cu	estore the schedule data irrent workbook data will	currently on the Ministry be overwritten with serve	server to this er data.	VALIADTI	ION CHECK		su
Backup	Back-up Schedu	lle data on the	Continue?				CRITICAL Flagged:	25	6. h - h	
	Ministry	/ server.			ОК	Cancel	VERIFY Flagged:	184		
Last Backup:			LOST INCOLOR.	2010/11/10 0.14.02 11	1		Attach file(s):		Last Submit:	
				М	IUNICIPALITY STATU	JS DASHBOARD				
Refresh T	able	Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Pri
Workflow	Status Flag	Smart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Not Started					
Workflow	Status Date	11/18/2016	11/18/2016	11/18/2016						
▶ H USER_CONTROL	🖉 HELP 🖉 CHECK 🔏 🚺	2 🖌 10 📈 12 📈 20 📈 2	2A 🖌 22B 🖌 22C 🖌 22	D 🖌 24A 🖌 24B 🖌 24C	24D 26A 26B	28 🖌 40 🖌 42 🖌 51	A 🖌 51B 🖌 51C 🖌 5.	◀		► [

The GO-Secure login screen will be displayed. Enter your login credentials and select → *Sign In*

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A B C D D	E F G H I	J	К	L
	Login	Σĭ	<u>ן</u>	
SMAF BACKUP Backup Back-up Schedule o Ministry se Last Backup:	GO Secure ID: Password: Cor, if you have a PKI certificate: Log in with PKI Sign In Forgot your ID or password? Don't have a GO Secure account? Register Now.	E	S JADTION CHECK agged: 25 agged: 184 file(s):	UBMIT SMART FIR St Submit Last Submit:
Refresh Table Workflow Status Flag S Workflow Status Date	© <u>QUEEN'S PRINTER FOR ONTARIO, 2012-13</u> ENV ID: UAT LAST MODIFIED: 2016-11-02 21:41:59 4	• Cancel	s 5 Prior Status 6	Prior Status 7 Pri

2.7 INSERTING ROWS IN TAX / PIL SCHEDULES

To insert a new row in a Tax or PIL you must first have a Special Area Levy. To **Add a Special Area Levy** to the schedule.

Select \rightarrow Add a Special Area Levy then select an area from the list and Select \rightarrow OK

AH C	ode:	511	104							for the year ended December 31, 2015
	3. U		-TIER SPECIAL		MATION	FCIAL AREA			_	
	Ļ	7.					· · · · ·		1 5	SPECIAL AREA LEVIES
							-	INSERT A ROW		SELECT AN AREA LEVY FROM THE LIST BELOW
99	L		TOTAL				•			Special Budgetary Levy Municipal Restructuring
	BTC	Tay	Property	Tax Rate	1	Percent of	CVA	Phase-In Tarrable		Urban Area
	RTO 1	Band 2	Class 3	Description 4	Tax Ratio 5	Full Rate 6	Assessment 7	Assessment 16	.T/ST 8	Norai Area Police Village
01	LIST	LIST				~	· · · · ·	: * : º	. SERVICES	Debt
										Fire
		_			-					
										Levy Code Sequence Levy Type
										120 01 Urban Area
					-					Enter a description for this levy type. (Optional but recommended)
										OK CANCEL
					-					
					-					
										0 0

The special area levy will be created with 20 rows

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Supper-tites special area Levy REMOVE A Special AREA LEVY 120 01 Urban Area- INSERT A ROW 9635 TOTAL	FIR2 Asmt C	f Ontor 201 Code: ode:	5: 512	Quinte \ Quinte \ 04	ffairs and Housing Nest C							l	MUNICIF	PAL and S	CHOOL I	Sche BOARD T	30.01.2017 15:34 adule 22 AXATION mber 31, 2018
SSS TOTAL UT set at an analysis Control and analysis TOTAL TOTAL Image: state and stat		3. UI	PPEF AE 120 0	B-TIER SPECIAL OD A SPECIAL A 11 Urban Area -	AREA LEVY INF	ORMATION	ECIAL ARE	A LEVY	INSERT A ROW	·							
FTC Tate Rate FTC For Class 3 Class 4 Percent of 5 CVA Full Pate 5 Phase in TateRate 5 TateRate 7 TateRate 5 Municipal Tates Education LT/ST TateRate 2 600 128 0 Uban Ares	9699	L		TOTAL				~						LT/ST Taxes	UT Taxes 0	Education Taxes	TOTAL
120 01 Ubban Acea N 3 0 0000000 000000000 000000000 000000000 0000000000 0000000000 0000000000 00000000000 000000000000 000000000000000000000000000000000000		RTC RTO 1	Tax Band 2	Property Class 3	Tax Rate Description 4	Tax Platio 5	Percent of Full Rate 6	CVA Assessment 7	Phase-In Taxable Assessment 16	LT/ST 8	Taxi UT 9	Rates EDUC 10	TOTAL 11	Municip LT / ST 12	al Taxes UT 13	Education Taxes 14	TOTAL 15
	6001		01														

To insert a new row select the **Special Area Levy** and Select \rightarrow **Insert a Row.** A new row will be added.

FIR Asmt MAH (201 Code Code:	5: 120 511	Quinte V 04 04	Vest C								MUNICIF	PAL and S	CHOOL for the year	Sche BOARD T ended Decer	dule AXAT
	3. U	PPER AD	-TIER SPECIAL	REA LEVY REA	MATION NOVE A SP	ECIAL ARE	A LEVY									
	Π	120 0	1 Urban Area -					INSERT A ROV	v							
	L						~						LT/ST Taxes	UT Taxes	Education Taxes	то
9699			TOTAL											0)	
		Ĩ	Property	Tax Rate		Percent of	CVA	Phase-In	ľ	Tax F	Rates		Municip	al Taxes	Education	I (******
	RTC BTQ	Tax Band	Class	Description	Tax Ratio	Full Rate	Assessment	Taxable Assessment	LT/ST	UT	EDUC	TOTAL	LT/ST	UT	Taxes	тс
	1 LIST	2 LIST	3	4	5	6	7	16 \$	8 0 yyyyyy %	9 0 yyyyyy %	10 0 9999999%	11 0 yyyyyy %	12	13 \$	14 \$	
6001	120	01	Urban Area					т						т	· A	
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If no Special Area Levy is selected the following message will be displayed, Select \rightarrow OK to continue.

Asmt MAH	Code	: 12 511	04 104									MUNICIF	PAL and S	for the yea	BOARD T	AX/ nber
	3. U	PPEF	-TIER SPECIAL	AREA LEVY INFOR	MATION											
		A	D A SPECIAL A	REA LEVY RE	MOVE A SP	ECIAL ARE	A LEVY									
	Í	120 0)1 Urban Area -													
								INSERTARO	N							
													ſ	·Y	(durables)	·
	L						~						LT/ST Taxes	UTTaxes	Taxes	1
9699			IUIAL						• • • • • • • •					l	Vj	<u></u>
	DTO	T	Property	Tax Bate		Percent of	CVA	Phase-In	1	Taxi	Rates		IVIICTOSOT	texcel		
	RTO	Band	Class	Description	Tax Ratio	Full Rate	Assessment 7	Assessment	LT/ST	UT	EDUC 10	TOTAL				
	LIST	LIST	3	4	0	*	\$	16 \$	8 0.xxxxxx%	9 O.xxxxxx%	0.828282	0.2222222%	Please	elect to inse	ert/remove a ro	w.
6001	120	01	Urban Area		1		Υ			r	1					
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9601	l			Subto	al	I	0	0		L					0	
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ABCLEEGGH I JKLM N O PCR S TUVN