

Ministry of Municipal Affairs and Housing

Financial Information Return (FIR)

Smart FIR Municipal User Guide

Version 5.0 Final

Table of Contents

1	Doo	cument History	3
2	Mu	nicipal Users	4
2	2.1	Initialize	4
2	2.2	Backup and Restore	9
2	2.3	Attach Files	14
2	2.4	Submit	17
	2.4	.1 Submit Errors	19
2	2.5	Returned Smart FIR	21
2	2.6	Viewing Versions	22

1 DOCUMENT HISTORY

Documen	nt 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

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.



About The Financial Information Return

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



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



AF	- C	D	F	F			G		н	1 1	
1	Province of Ontario	Ministry of Municipal A	Itaira		1		0	16.11.2016 03:53	-11	1 0	
2											
2	20	16 FIN	JANC	IAL IN	1FOR		ION R	EIURN			
3											
4	Welcome to	the CID2016/D	CADU								
6	weicome to	ule l'inzo lofi	SADJ:								
7	To begin com	plating the EIR?	016 using thi	e MS Evcal e	nroadshoot	simply follow	the stone halo	0.M ⁻			
8	ro begin com	ploting the ring	to to using th	S NO EXCENS	preadoneer,	simply follow	the steps belo				
					r:						
0	Please select	the Municipal	ity you wish t	to complete	Quinte West	С					
10				- -							
11	Once the Mur	nicinality is sole	cted several	Datapoints fro	m the previo	us year FIR	and other sour	ces will be Pre-Lo	hahe		
12	into this FIR2	016 Excel spre	adsheet and	the FIR2016 S	Schedules wi	Il become vis	ible	CCS WIN DO TTO ED	4404		
13	into this find.	e te Exteri opro	adonoot, and		somoutioo m						
14	The file will au	utomatically be	saved onto vo	our selected fo	Ider as FI16:	xxxx Municip	alityName.xlsr	n.			
15	where xxxx is	the 4-digit Coo	le of the muni	cipality select	ed above.			~			
16		5									
17		-									
18			Please	oncure the	Municipali	the list of all		-			
19			then	CILICK HEDE	Municipal	Completing	the EID201				
20			ulenc	LICKTICK	to begin	completing	g the rikzon	•			
21											
22											
23	If you experie	nce difficulty, pl	lease email th	e Ministry at:	FIR.m	ah@onta	rio.ca				
24											
25											
26											
27											
14 4 >	H CONTROL	192			CONTROL						

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

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

	B C D E F Promise of Oktarlo - Ministry of Mavicipal Affairs	G	M.11.2016 03:53	IJ
3	2016 FINANCIAL INFORM	ATION F	RETURN	
5	Welcome to the FIR2016(PSAB)!			
78	To begin completing the FIR2016 using this MS Excel spreadsheet FIR Set	-Up	-	2
9 10 11 12	Please select the Municipality you wish to complete: Quinte Wes Once the Municipality is selected, several Datapoints from the previ into this FIR2016 Excel spreadsheet, and the FIR2016 Schedules v	Several Previous Municipality: Q complete. The	-Year datapoints will now be Pre uinte West C. This may take sever FIR Schedules will be displayed or	-Loaded for the ral moments to nce this is completed.
13 14 15 16 17	The file will automatically be saved onto your selected folder as FI1 where xxxx is the 4-digit Code of the municipality selected above.		0	K Cancel
18 19 20 21	Please ensure the Municipality list then CLICK HERE to Begin Comp	ed above is corr leting the FIR20	rect 16	
23 24	If you experience difficulty, please email the Ministry at: FIR.mah@	ontario.ca		
25 26 27				
1				

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

Ontario 🕅	Français
OPS BPS Secure Login	
Login with your certificate	
Email Address	
Password	New to OPS BPS Secure?
Forgot Password?	Register new account
***Note: Register new account/Password reset takes 20 mins to take effect, please wait before trying to log in again.	
login	
Accessibility Privacy © King's Printer for Ontario,	2-21

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.

HIPORTANT DO NOT change settings which are built into this FIR2014, or the FIR The FIR2014 has been pre-formatized to ensure that every user can complete The FIR2014 has been pre-formatized to ensure that every user can complete The FIR2014 has been pre-formatized to ensure that every user can complete Do Hot CUT and PASTE (or ping 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 start over. It is also recommended that you DO NOT Copy and Paste. However, the Copy information is only copied and pasted from one pervectionately the treater as a cut and paste and we damage the FIR. NOTE: Please ensure that a valid email hormation that is copied and pasted from an open workbook within the same Do NOT Paste into a cell that contains a drop-down LIST, otherwise the LIST, CHECKS and calculations will no longer function. Do Not Set up the FIR2014 file as a "Shared Workbook" Setting up the files as a fishared Workbook* Setting up the file as a shared workbook will not allow the macros to function property. Upon Completion Hear end in the FIR2014 file of TR.mah@ontario.cs. Sign and fax Schedule 02 to Jim Simos at (rts) SS-S315. Please do not fax the entire workbook.	Province of Ontario - Ministry of Municipal Affairs and Housing		F	G 08.02.2(H I 16 15:33				
DO NOT change settings which are built into this FIR2014, or the FIR The FIR2014 has been pre-formatted to ensure that every user can complete DO NOT CUT and PASTE (or similarly Drag and Drop) CUT and PASTE (or similarly Drag and Drop) CUT and PASTE (or poing and Drop) will greatly affect many or all of the backer FIR2014. If you cut and paste any information into the FIR file, unfortunately the start over. It is also recommended that you DO NOT Copy and Paste. However, the Copy Information is only copied and pasted from one Excel application to another is treated as a cut and paste and wir damage the FIR file. Also, DO NOT Paste into a cell that contains a drop-down LIST, otherwise the LIST, CHECKS 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 property. Upon Completion Please use Winzip to Zip your file. The meanil the FH4xxxx MunicipalityHame.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (416) 565-5315. Please do not fax the entire workbook.	IMPORTANT		-						
The FIR2014 has been pre-formatted to ensure that every user can complete DO HOT CUT and PASTE (or similarly Drag and Drop) will greatly affect many or all of the backs FIR2014. If You cut and pastes any information into the FR file, unfortunately in- start over. It is also recommended that you DO NOT Copy and Paste. However, the Copy information is only copied and pasted from one Excel application to another is treated as a cut and paste and will damage the FH file. Also, DO NOT Paste into a cell that contains a drop-down LST, otherwise the LST, CHECKS 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 property. Upon Completion Please use Winzip to Zip your file. The meanil the FIH2toxx MunicipalityHame.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (14) FELP_ORECK_02_010_122_200_222A_228_220_220_224A_248_244C_240_268_28_40_268_28_40_42_51A_518_51C_53_54A_548_40	DO NOT change settings which are built into t	his FIR2014, or the FIR Begin F	IR	in the second		23)		
Do Not CUT and PASTE (or prag 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 start 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 an open workbook within the same DO NOT Paste into a cell that contains a drop-down LIST, otherwise the LIST, CHECKS and calculations will no longer function. Do Not set up the FIR2014 file as a "Shared Workbook" Setting up the files as a shared workbook will not allow the macros to function properly. Upon Completion Please use Winzip to Zip your file. Then email the FI4Xxxx MunicipalityMame.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (416) 585-6315. Please do not fax the entire workbook.	The FIR2014 has been pre-formatted to ensure that e	very user can complete t	Data has now b	een successfully load	ed to the FIR. Please	e press OK to			
It is also recommended that you DD NOT Copy and Paste. However, the Copy information is only copied and pasted from an open workbook within the same information is only copied and pasted from one Excel application to another is treated as a cut and paste and will damage the FIR file. Also, DD NOT Paste into a cell that contains a drop-down LIST, otherwise the LIST, CHECKS and calculations will no longer function. OK Do Not Paste into a cell that contains a drop-down LIST, otherwise the LIST, CHECKS and calculations will no longer function. OK Do Not set up the FIR2014 file as a "Shared Workbook" Setting up the file as a "Shared Workbook" Setting up the file as a shared workbook will not allow the macros to function properly. Upon Completion Place use Winzip to Zip your file. Then email the FI4xxxxX MunicipalityName.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (16) 585-6315. Please do not fax the entire workbook.	Do Not CUT and PASTE (or similarly Drag and Drop CUT and PASTE (or Drag and Drop) will greatly affec FIR2014. If you cut and paste any information into the start over.) many or all of the backgr FIR file, unfortunately the	begin completi address is enter	ng the FIR. NOTE: Pla ed on the Cover Page	ease ensure that a v (Schedule 02).	alid email			
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 properly. Upon Completion Please use Winzip to Zip your file. Then email the FI4xxxx MunicipalityName.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (416) 585-5315. Please do not fax the entire workbook.	It is also recommended that you DO NOT Copy and Pa information is only copied and pasted from an open w Information that is copied and pasted from one Excel DO NOT Paste into a cell that contains a drop-down L	ste. However, the Copy orkbook within the same application to another is treated as IST, otherwise the LIST, CHECKS a	a cut and paste and w nd calculations will no	Il damage the FIR file. A longer function.	liso,	ОК			
Setting up the file as a shared workbook will not allow the macros to function properly. Upon Completion Please use Winzip to Zip your file. Then email the F14xxxx Municipalityllame.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (416) 585-6315. Please do not fax the entire workbook.	Do Not set up the FIR2014 file as a "Shared Workb	ook"							
Upon Completion Please use Winzip to Zip your file. Then email the F14xxxx MunicipalityName.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (416) 585-6315. Please do not fax the entire workbook. I HELP CHECK 02 10 12 20 224 228 222 220 244 248 242 246 246 268 28 40 42 514 518 510 53 544 548 7	Setting up the file as a shared workbook will not allow	v the macros to function properly.							
Please use Winzip to Zip your file. Then email the FI14xxxx MunicipalityName.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (416) 585-6315. Please do not fax the entire workbook.	Upon Completion								
Then email the FI14xxxx MunicipalityName.zip file to FIR.mah@ontario.ca. Sign and fax Schedule 02 to Jim Simos at (416) 585-6315. Please do not fax the entire workbook.	Please use Winzip to Zip your file.								
H = H = LP _ CHECK _ 02 _ 10 _ 12 _ 20 _ 22A _ 22B _ 22C _ 22D _ 24A _ 24B _ 24C _ 24D _ 26A _ 26B _ 28 _ 40 _ 42 _ 51A _ 51B _ 51C _ 53 _ 54A _ 54B _ 0	Then email the FI14xxxx MunicipalityName.zip f (416) 585-6315. Please do not fax the entire wo	ile to FIR.mah@ontario.ca. Sigi rkbook.	n and fax Schedule 0	2 to Jim Simos at					
H LP_CHECK_02_10_12_20_22A_22B_22C_22D_24A_24B_24C_24D_25A_26B_28_40_42_51A_51B_51C_53_54A_54B_70									
	H LP CHECK 02 10 12 20 2	2A / 22B / 22C / 22D / 24	A / 24B / 24C /	24D / 26A / 26B	28 / 40 / 42 /	51A / 51B / 51	C / 53 / 54A /	54B / 0	

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.

C	D	E	F	G	н		J	ĸ	L	
rovince of Ontario - Ministr	y of Municipal Attairs									
				EID201	SIISED CC					
				FINZULU	D OSEN CC		ANEL			
				N	lunicipality: Carleto	n Place T (0928)				
	SMART	FIR SCHEDUL	ES BACKUP & RES	TORE					SUBMIT SMART F	IR
	BACKUP			RESTORE						
			Select a Version		1	-	VALIADTIC	ON CHECK		
			@ Working C	Submitted CI MEPBO	aan C Last Returned			in children		
Backup	Back-up Schedule dat	ta on the	· · · · · · · · · · · · · · · · · · ·				CRITICAL Flagged:	25		Τ
	Ministry serve	r.	Restore	Restore Schedule data	from the Ministry server				Submit	
							VERIFY Flagged:	184		
Last Backup:			Last Restore	e:			Attach file(s):	N I	Last Submit	<i>t</i> :
]		2		1
				M	UNICIPALITY STATI					
Refresh Tab		urrent Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	T
Workflow Sta	atus Flag Sma	art FIR Initialized	Not Started							
										t
Workflow Sta	tus Date	11/18/2016	/							4

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.

$1 \rightarrow (f_x)$									
C D ince of Ontario - Ministry of Municipal Aff	E	F	G	Н	1	J	к	L	
			FIR201	6 USER C	ONTROL P	PANEL			
			N	lunicipality: Carlet	on Place T (0928)	[
	SMART FIR SCHEDUL	ES BACKUP & RES	STORE				:	SUBMIT SMART FI	R
BACKUP			RESTORE						
		Select a Version (R) Working C	Submitted CI MEPBIC	con C Last Returned		VALIADTI	ON CHECK		su
Backup Back-up Sc	hedule data on the					CRITICAL Flagged:	25		
Mir	histry server.	Restore	Restore Schedule data	from the Ministry serve	r.	VERIFY Flagged:	184	Submit	
Last Backup:		Last Restor	e:			Attach file(s):	0	Last Submit:	
			N	IUNICIPALITY STAT	TUS DASHBOARD				
Refresh Table	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	Not Started							
Workflow Status Date	11/18/2016								
HELD CONTROL HELD CHECK	102 /10 /12 /20 /2	24 /228 /226 /2	20 /244 /248 /240	(24D / 26A / 26D	200 / A0 / AD / FT	/510 /51C /50	111	obstated at a factor of the fa	A CONTRACT

To back up the data in the Smart FIR select → *Backup button*

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

				FIR201	5 USER CC	ONTROL F	PANEL			
			FIR Backup	N	lunicipality: Carloto	n Place T (0928)				
	SMART FIR	SCHEDULE	S					s	UBMIT SMART F	IR
	ВАСКИР		This process will Ministry server. 1	back-up the schedule da The current back-up data	ta currently on this work in the server will be over	book to the written.	VALIADTI	ON CHECK		
Backup	Back-up Schedule data on	the					CRITICAL Flagged:	25		Τ
	Ministry server.				ок	Cancel	VERIFY Flagged:	184	Submit	
Last Backup:			Case restores				Attach file(s):	0	Last Submit	
				N	UNICIPALITY STAT	JS DASHBOARD				
Refresh Ta	ble Currer	nt Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	T
Workflow	tatus Flag Smart Fil	R Initialized	Not Started							

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 \rightarrow *Login.*

Ontario 🕅	Français
OPS BPS Secure Login	
Login with your certificate	
Email Address	
Password New to OPS BPS Secure?	
Register new account	
***Note: Register new account/rassword reset takes 20 mins to take effect, please wait before trying to log in again.	
Login	
Accessibility Privacy <u>© King's Printer for Ontario. 2012-21</u>	

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

			FIR201	5 USER CC	ONTROL P	ANEL		
			N	lunicipality: Carleto	n Place T (0928)			
	SMART FIR SCH	EDULES BACKUP & RES	TC Microsoft Excel	×.)	1		S	UBMIT SMART F
	ВАСКИР	Select a Version	Data back-up proc	ess completed.	-	VALIADTIC	ON CHECK	
Backup	Back-up Schedule data on the Ministry server.	Restore	R	ОК		CRITICAL Flagged:	25	Submit
Last Backup:	6n	Last Restore	:			Attach file(s):	<u>.</u>	Last Submit
			N	UNICIPALITY STATE	JS DASHBOARD			
Refresh Ta	ble Current Stat	us Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7
Workflow S	tatus Flag Smart FIR Initia	ized Not Started						
	atur Data 11/18/2016							

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

A B	С	D	E	F	G	п
					M	lunicipality: Carlet
			SMART FIR SCHEDUL	ES BACKUP & REST	ORE	
		BACKUP			RESTORE	
	1			Select a Version	Submitted CI MFPB Cle	an Ci Last Returned
	Backup	Back-up Sc Min	hedule data on the nistry server.	Restore	Restore Schedule data 1	from the Ministry serve
	Last Backup:	2016/11/18 2:17:2	29 PM	Last Restore:		
					м	
	Refresh Ta	able	Current Status	Prior Status 1	M Prior Status 2	UNICIPALITY STAT
	Refresh Ta	able	Current Status Smart FIR Initialized	Prior Status 1 Smart FIR Initialized	M Prior Status 2 Not Started	UNICIPALITY STAT
	Refresh Tz Workflow S Workflow S	able Status Flag tatus Date	Current Status Smart FIR Initialized 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	M Prior Status 2 Not Started	UNICIPALITY STAT
	Refresh Ta Workflow S Workflow S Backup	able Status Flag tatus Date	Current Status Smart FIR Initialized 11/18/2016 11/18/2015	Prior Status 1 Smart FIR Initialized 11/18/2016	M Prior Status 2 Not Started	UNICIPALITY STAT Prior Status 3
	Refresh Ta Workflow S Workflow S Backup Restore	able Status Flag tatus Date Date E Date	Current Status Smart FIR Initialized 11/18/2016 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	M Prior Status 2 Not Started	UNICIPALITY STAT
	Refresh Ta Workflow 9 Workflow 5 Backup Restore	able Status Flag tatus Døte o Døte e Døte	Current Status Smart FIR Initialized 11/18/2016 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	M Prior Status 2 Not Started	UNICIPALITY STAT Prior Status 3

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.

C	D	E								
				N	lunicipality: Carleto	on Place T (0928)				
		SMART FIR SCHEDU	LES BACKUP & RE	STORE					SUBMIT SMART F	IR
	BACKUP	18		RESTORE			2.			
			Select a Version	C Submitted C MFPBC	an C: Last Returned		VALIADTI	ON CHECK		:
Backup	Back-up Sc	hedule data on the	Postoro			-	CRITICAL Flagged:	25	Cubmit	
	Mit	nistry server.	Restore	Restore Schedule data	from the Ministry server.		VERIFY Flagged:	184	Submit	
		0.044	Last Restor				Attach file(s)	R I	Last Submit	
Last Backup:	2016/11/18 2:17:2	3 FW	Lost incitor	M	UNICIPALITY STAT	US DASHBOARD				
Last Backup:	able	Current Status	Prior Status 1	Prior Status 2	UNICIPALITY STAT	US DASHBOARD Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	F
Last Backup: Refresh Ta Workflow S	ableStatus Flag	Current Status Smart FIR Initialized	Prior Status 1 Smart FIR Initialized	Prior Status 2 Not Started	UNICIPALITY STAT	US DASHBOARD Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	F
Last Backup: Refresh Ta Workflow S	ableStatus Flag	Current Status Smart FIR Initialized 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	Prior Status 2 Not Started	UNICIPALITY STATI Prior Status 3	US DASHBOARD	Prior Status 5	Prior Status 6	Prior Status 7	P
Last Backup: Refresh Ta Workflow S Backup	able Status Flag Status Date p Date	Current Status Smart FIR Initialized 11/18/2016 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	Prior Status 2 Not Started	UNICIPALITY STATI	JS DASHBOARD Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	P

		SMART FIR SCHEDUL	ES BACKUP & REST	ORE				S	UBMIT SMART F	R
	BACKUP			RESTORE]	¢.			
			FIR Restore	toring and	er Tartura	- 	VALIADTI	ON CHECK		
Backup	Back-up Sch	edule data on the	-				CRITICAL Flagged:	25		
	Mini	istry server.	This process will re workbook. The cu	estore the schedule data rrent workbook data wil	currently on the Ministry be overwritten with serve	server to this r data.	VERIFY Flagged:	184	Submit	
Last Backup:	2016/11/18 2:17:29	9 PM	Continue?				Attach file(s):	0	Last Submit	
					OK	Cancel				
Refresh Ta	ble	Current Status	Prior Status 1	Prior Status 2	OK Prior Status 3	Cancel Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	
Refresh Ta	bleitatus Flag	Current Status Smart FIR Initialized	Prior Status 1 Smart FIR Initialized	Prior Status 2 Not Started	OK Prior Status 3	Cancel Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	
Refresh Ta Workflow 9 Workflow 9	ible itatus Flag tatus Date	Current Status Smart FIR Initialized 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	Prior Status 2 Not Started	OK Prior Status 3	Cancel Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	
Refresh Ta Workflow 9 Workflow 5 Backup	ible itatus Flag tatus Date Date	Current Status Smart FIR Initialized 11/18/2016 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	Prior Status 2 Not Started	OK	Cancel Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	

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

The OPS BPS Secure Login screen will be displayed enter your login credentials and select \rightarrow *Login*.



Tip

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

								IN IN	-	-
				N	lunicipality: Carleto	n Place T (0928)				
	SM	ART FIR SCHEDU	LES BACKUP & RES	TORE		Ĩ.		S	UBMIT SMART FI	R
	BACKUP	[Microsoft Excel	23 1FPB C	ean 🖸 Last Returned		VALIADTI	ON CHECK		su
Backup	Back-up Schedul	e data on the	Data restore process co	ompleted.			CRITICAL Flagged:	25		
	Ministry	server.		data	from the Ministry server.		VERIFY Flagged:	184	Submit	
Last Backup: 20	016/11/18 2:17:29 PM						Attach file(s):	0	Last Submit:	
Refresh Table		Current Status	Prior Status 1	N Prior Status 2	UNICIPALITY STATU	IS DASHBOARD	Prior Status 5	Prior Status 6	Prior Status 7	Pri
Refresh Table Workflow Stat	e	Current Status Smart FIR Initialized	Prior Status 1 Smart FIR Initialized	Prior Status 2 Not Started	IUNICIPALITY STATL Prior Status 3	JS DASHBOARD Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Pri
Refresh Table Workflow Stat	e tus Flag us Date	Current Status Smart FIR Initialized 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	N Prior Status 2 Not Started	UNICIPALITY STATU Prior Status 3	JS DASHBOARD Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Pri
Refresh Table Workflow State Workflow State Backup Da	e tus Flag us Date ste	Current Status Smart FIR Initialized 11/18/2016 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	Not Started	UNICIPALITY STATU Prior Status 3	IS DASHBOARD Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Pri
Refresh Table Workflow Stat Workflow Stat Backup Da Restore Da	e tus Flag us Date ate ate	Current Status Smart FIR Initialized 11/18/2016 11/18/2016	Prior Status 1 Smart FIR Initialized 11/18/2016	Prior Status 2 Not Started	IUNICIPALITY STATU Prior Status 3	IS DASHBOARD Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	Pri

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.

			FIR2016	USER CC	NTROL F	PANEL			
	SMART FIR SCHEE	ULES BACKUP & REST	TORE				S	UBMIT SMART F	IR
	ВАСКИР		RESTORE						
		Select a Version (*) Working C1	Submitted Ci MFPB Clea	n 🔿 Last Returned		VALIADTIC	ON CHECK		
Backup	Back-up Schedule data on the					CRITICAL Flagged:	25	1	Γ
	Ministry server.	Restore	Restore Schedule data fr	rom the Ministry server.		VERIFY Flagged:	184	Submit	
Last Backup:		Last Restore:	2016/11/18 3:14:02 PM			Attach file(s)		Last Submit	
			м	JNICIPALITY STATU	IS DASHBOARD				
Refresh Table	Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	
Workflow Stat	us Flag Smart FIR Initialize	d Smart FIR Initialized	Smart FIR Initialized	Not Started					
WORKHOW Stat									ALC: NO

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

Ontario 😵	Français
OPS BPS Secure Login Login with your certificate Email Address	
Password New to OPS BPS Secure?	
***Note: Register new account/Password reset takes 20 mins to take effect, please wait before trying to log in again.	
Accessibility Privacy © King's Printer for Ontario. 2012–21	

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*

a tta	ach 🕶 🖌 💥			
Туре	Description	Reference	Created By	Last Modified

	File		×	-
🐉 🥔 Attach	File Name			
Туре			Browse	н
	12 			
	File Description		-	
			-	
			~~~	
			Υ.	
		OK C	Cancel	

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

🚯 🥔 Atta	ch 🕶 🖉 🗙			
Tvne	Description	Reference	Created By	Last Modified
File		FIR UAT Guide.d	Mfpbuser +06@gmail	Sunday, February 14, 201.

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  $\rightarrow X$ 

Schline,Perio	d,2221,F114,Scenario,Ve	rsion, schuneblock, school		
🚯 🥔 <u>A</u> tta	ch 🕶 🥒 🗙			
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 CONTR Municipality: Carleton Place T	OL PANEL	
	SMART FIR SCHED	ULES BACKUP & RESTORE	sl	BMIT SMART FIR
	BACKUP	RESTORE		
		Select a Version      Working Cl Submitted Cl MFPB Class Cl Last Returned	VALIADTION CHECK	su
Backup	Back-up Schedule data on the	Portoro	CRITICAL Flagged: 0	Calanti
	Ministry server.	Restore Schedule data from the Ministry server.	VERIFY Flagged: Ö	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.

This process will subm	it the completed EIP sched	ular to MEDR
This process will soon	at the completed rat sched	and to mirro.
Cantinual		
Continue?		
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  $\rightarrow OK$ 

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	
20	IAXATION AND PAYMENTS-IN-LIEU SUMMARY	
20	CONCOLIDATED STATEMENT OF OPERATIONS: EVENCES	UPPER-IER UNLT
40	ADDITIONAL INCODINATION	
42		
51	CONSOLIDATED STATEMENT OF CHANCE IN NET ENANCH	AL ACCETC (NET DEPT) AND
53	TANGIBLE CAPITAL ASSET ACQUISITION FINANCING/DON	ATIONS
54	CONSOLIDATED STATEMENT OF CASH FLOW	(SELECT DIRECT OR INDIRECT METHOD)
60	CONTINUITY OF RESERVES AND RESERVE FUNDS	
61	DEVELOPMENT CHARGES RESERVE FUNDS	
62	DEVELOPMENT CHARGES RATES (INCLUDING SPECIAL AF	(EAS)
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 TOTA	AL ALL)
79	COMMUNITY IMPROVEMENT PLANS	
80	STATISTICAL INFORMATION	
81	ANNUAL DEBT REPAYMENT LIMIT	
83	NOTES	
chee	cking the boxes, I acknowledge that:	
	a the avantation of this Cinemain Information Datum	al en en en ante al centre en el en este el centre de la decisión de la centre de la centre en en entre els est
ho	oks and records of the municipality and its consolid:	the amounts disclosed on the attached schedules are in agreement with the
00	loks and records of the municipality and its consolide	aled entities.

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

D	E	Linked Reportin	g Objects		-	-		L	М
BACKUP		SchLine,Peri	od, 4331, FY 14, Scenario, Ve	ersion, Schl.ineBlock, SchC	<u>ol</u>				SUBMI
Back-up Sche	edule data on the Ministry server.	🕼 🥔 Att	ach 🕶 🖌 💥					Submit	
2016/0	02/17 4:27:03 PM	Туре	Description	Reference	Created By	Last Modified		Last Submit:	
le	Current Status							Prior Status 7	Prior Sta
us Flag	Smart FIR Initialized								
ıs Date	02/17/2016								
te	02/17/2016	Hide Intersed	tion				Close		
		<u></u>							

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

Back-up       Schedule data on the Ministry server.       Restore       Restore       2018/02/17 5:10:34 PM       Last Restore       2018/02/17 4:12:18 PM         VALUATION CHECK       Submit PR Schedule data from the Ministry server.       Image: Schedule data from the Ministry server.       Image: Schedule data from the Ministry server.       Submit PR Schedule, sc		BACKUP			RESTORE							
Backup       Back-up Schedule data on the Ministry server.       Restore       Submit Process completed.       Submit Submit Process completed.       Submit Process completed.       Submit Submit Process completed.       Submit Pr	1			Select a Version	omitted C MFPB Clean	Clast Returned	ſ	VALIADI			SUBMIT FIK	
Last Backup:       2016/02/17 5: 10: 14 PM       Last Restore:       2016/02/17 4: 12: 18 PM       Last Submit:       Last Submit: <th< th=""><th>Backup</th><th colspan="2">Back-up Schedule data on the Ministry server.</th><th colspan="2">Restore Restore Schedule data from the Mini</th><th>a from the Ministry server.</th><th></th><th colspan="2">Microsoft Excel</th><th>Submit</th><th>Submit FIR</th><th>Schedules.</th></th<>	Backup	Back-up Schedule data on the Ministry server.		Restore Restore Schedule data from the Mini		a from the Ministry server.		Microsoft Excel		Submit	Submit FIR	Schedules.
OK           OK           Refresh Table         Current Status 1         Prior Status 2         Prior Status 3         Prior Status 4         Prior Status 5         Prior Status 6         Prior Status 7         Prior Status 8	Last Backup:	Last Backup: 2016/02/17 5:10:14 PM		Last Restore: 2016/02/17 4:12:18 PM				Last Submit:				
MUNICIPALITY STATUS DASHBOA         Refresh Table       Current 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 8         Workflow Status Fig       Submitted Under Review       mart FIR Initialized       Smart FIR Initialized       Smart FIR Initialized       Smart FIR Initialized       Not Started       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       E       <				2					ОК		7	
Refresh Table         Current Status         Prior Status 1         Prior Status 2         Prior Status 3         Prior Status 4         Prior Status 5         Prior Status 6         Prior Status 7         Prior St						MUNICIPALITY STAT	US DASHBOA					
Workflow Status Flag         Submitted Under Review         mart FIR Initialized         Smart FIR Initialized         Smart FIR Initialized         Not Started         Initialized         In	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 Status 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         02/17/2016         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1         1	Workflow St	atus Flag	ubmitted Under Review	imart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Not Started				
Backup Date         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/2016         02/17/	Workflow Sta	atus Date	02/17/2016	02/17/2016	02/17/2016	02/17/2016	02/17/2016					
Restore Date 02/17/2016 02/17/2016 02/17/2016	Backup D	Date	02/17/2016	02/17/2016	02/17/2016							
	Restore I	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 MFPB.

Microsoft Excel	×
Cannot proceed due to the number of Criti	ical flagged or Verify flagged.
	ОК

If the checkboxes on the Declaration are not checked, the following message will be displayed, select  $\rightarrow$  **OK** and **check** the boxes

neuu	le	Title	
10	CONSOLIDATED STATE	MENT OF OPERATIONS: REVENUE	
12	GRANTS, USER FEES A	ND SERVICE CHARGES	
20	TAXATION INFORMATIC	N	
22	MUNICIPAL AND SCHOOL	UL BOARD TAXATION	
24	PAYMENTS-IN-LIEU OF	TAXATION	
26	TAXATION AND PAYME	NTS-N-LIEU SUMMARY	
28	UPPER-TIER ENTITLEMEN	VTS	UPPER-TIER ONLY
40	CONSOLIDATED STATE	MENT OF OPERATIONS: EXPENSES	
42	ADDITIONAL INFORMAT	ION	
51	SCHEDULE OF TANGIBL	E CAPITAL ASSETS	
53	CONSOLIDATED STATE TANGIBLE CAPITAL AS	MENT OF CHANGE IN NET FINANCIAL ASSETS (NET DEBT) AND SET ACQUISITION FINANCING/DONATIONS	
54	CONSOLIDATED STAT	Microsoft Excel	NRECT METHOD)
60	CONTINUITY OF RESER		
61	DEVELOPMENT CHARC		***************************************
62	DEVELOPMENT CHARC	You must acknowledge to terms by checking all boxes.	
70	CONSOLIDATED STAT		
72	CONTINUITY OF TAXES		SINGLE/LOWER-TIER ONLY
74	LONG TERM LIABLITE	ОК	
75	WATER AND WASTEW		
76	GOVERNMENT BUSINES	IS ENTERPRISES (GBE)	
77	OTHER ENTITIES (DSSA	B, HEALTH UNIT, OTHER AND TOTAL ALL)	
79	COMMUNITY IMPROVEN	IENT PLANS	
80	STATISTICAL INFORMA	TION	
81	ANNUAL DEBT REPAYIN	IENT LIMIT	
83	NOTES		

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		PANEL					
		SMART FIR SCHEDU	ES BACKUP & RES	TORE	Municipaiity: Aja	(1 [1803]			SUBMIT SMART FI	R		
BACKUP Backup Backup Back-up Schedule data on the Ministry server. Last Backup:			Restore	REST [®] Microso samu Prestore Sch	STC Microsoft Excel			FR, Please contact MFPB if you Submit Last Submit:		SUBMIT FIR Submik FIP	SUBMIT FIR Submit FFI Schedules.	
				M	UNICIPALITY STATUS	DASHBOARD						
Refresh Tab	le	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 Status 9	
Workflow Sta	atus Flag	Submitted Under Review	mart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Not Started					
Workflow Sta	atus 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	011710010	0117310046	0.016310040	0011710010							

### 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.



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* 

				FIR2016	USER CC	NTROL P	PANEL				
					Municipality: A	ax T (1805)					
	SM	ART FIR SCHEDUL	ES BACKUP & REST	TORE					SUBMIT SMART F	IR	
	BACKUP			RESTORE							
	Backup Back-up Schedule data on the Ministry server.		State 2 Marcan Consumities Chartel Crean Crast Between				VALIADTION CHECK		SUBMIT FIR		
Backup			Restore				CRITICAL Flagged 24		Large 1		
			Restore Schedule data from the Ministry server.				VERIFY Flagged 1		Submit FIR Scher		Schedules.
Last Backup:			Last Restore:				Attach file(s):		Last Submit:		
						-					
				м	UNICIPALITY STATI	JS DASHBOARD					1
Refresh Tabl	•	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 9
Worldlow Sta	itus Flag	Accepted Clean	Updated Under Review	Submitted Under Review	MFPB Working Restore	MFPB Working Bestore	MFPB Working Restore	Updated Beturned	Updated Under Review	Clean Re-Opened	Accepted Clea
Workflow Star	tus 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	11/14/2016
Backup D	late	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	11/10/2016
Bastore	late	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	11/10/2016

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

Province of Ontario - Ministry of Municipal Affairs

		FIR Restore	Mi	unicipality: Carleti	on Place T (0928)				
	SMART FIR SCHEDU	LES			-			SUBMIT SMART F	IR
BACK	JP	This process will n workbook. The cu Continue?	estore the schedule data c irrent workbook data will b	urrently on the Ministry se overwritten with serv	VALIADTION CHECK			S	
Backup Back-	up Schedule data on the					CRITICAL Flagged:	25		
	Ministry server.			ОК	Cancel	VERIFY Flagged:	184	Submit	
Last Backup:		Lust ne store	2010/11/10 0.14.02 1111	-		Attach file(s):		Last Submit	
			ML	JNICIPALITY STAT	US DASHBOARD				
Refresh Table	Current Status	Prior Status 1	Prior Status 2	Prior Status 3	Prior Status 4	Prior Status 5	Prior Status 6	Prior Status 7	P
	Smart FIR Initialized	Smart FIR Initialized	Smart FIR Initialized	Not Started					
Workflow Status Flag									1946-646

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

Ontario 😵	Français	t)
OPS BPS Secure Login Login with your certificate Email Address		
Password Forgot Password? ****Note: Register new account/Password reset tal mins to take effect, please wait before trying to log Login	New to OPS BPS Secure? Register new account in again.	
Accessibility Privacy © King's Printer fo	<u>Ontario. 2012–21</u>	