



May 12, 2020

To: All Municipal Financial Administrators

Re: Statutory Deadlines for Municipal Submissions to the Ministry

The new Local Government Data Entry (LGDE) and Local Government Data Entry Tax (LGDE Tax) are now available for your annual input. You can access these forms on the Local Government Information System (LGIS) at www.localgovernmentinformationsystem.gov.bc.ca/LGIS. You must have an active BCeID for your organization that has been granted access to the LGDE module. If you are not able to access the LGDE module, please contact us at LGDE@gov.bc.ca.

Local governments will now be able to upload reporting documents on LGIS using the new document submission portal. This will eliminate the need for your financial documents to be mailed or emailed in. Please see the attached help document for additional instructions.

Given the current Covid-19 pandemic, the due dates for this year's financial reporting submissions to the Ministry have been extended as follows:

June 1, 2020

2020 LGDE Tax Forms
2020 Tax Rate Bylaw*
2020-2024 Financial Plan Bylaw*

August 31, 2020

2019 LGDE Financial Form
2019 Audited Financial Statements
2019 Statement of Financial Information
2019 Annual Report

**Please note the Financial Plan and Tax Rate Bylaws must be adopted by May 14, 2020. As per Ministerial Order M083, all readings and final adoption may occur on the same day.*

Annual tax information is used to verify Provincial Government grant-in-lieu payment amounts, so timely information will help ensure timely payments. If you're unable to meet the June 1, 2020 deadline, we ask that email LGDE@gov.bc.ca detailing the reasons why.

To assist you in fulfilling your statutory requirements, we have prepared the attached checklist detailing the elements and deadlines required and attached help document for the new LGDE system including links to new LGDE Help Manuals. Please share these resources with others in your organization that may be responsible for different aspects of the statutory requirements.

If you have any questions or need clarification, please contact the Ministry at LGDE@gov.bc.ca.

Sean Grant
Director, Local Government Finance
Attachments

Financial Data/LGDE
(Section 167 of the *Community Charter*)
Due: Monday, August 31, 2020

Requirements:

- 2019 LGDE Financial Form
- 2019 Audited Financial Statements (1 copy)

Tax Rate Data/LGDE Tax
(Sections 167 and 197 of the *Community Charter*)
Due: Monday, June 1, 2020

Requirements:

- 2020 LGDE Tax Form
- 2020 Tax Rate bylaw
- Any new or amended parcel tax bylaws
- 2020-2024 Financial Plan bylaw

Financial Information Act/Statement of Financial Information (SOFI)
(Section 2 of the *Financial Information Act*)
Due: Monday, August 31, 2020

Requirements (for more information visit: <http://www.fin.gov.bc.ca/ocg/fmb/fia/fia.htm>):

- Checklist
- 2019 Audited Financial Statements (1 copy)
- Schedule of employee remuneration
- Schedule of council remuneration
- Schedule of payments to suppliers
- Approval by CFO **and** Council
- Management Letter
- Schedule of Guarantee and Indemnity agreements


Annual Report
(Sections 98 and 99 of the *Community Charter*)
Due: Presented at public meeting by **August 31, 2020**
but no requirement to submit to the Ministry

NEW LGDE GENERAL OPERATING INSTRUCTIONS

Gaining Access

To log in to this system, you must have a BCeID registered to your organization that has also been granted access to LGIS by Ministry staff. Users can request access through LGIS via a request form. Please contact LGIS.AccessRequest@gov.bc.ca if you have any issues with the form. Step-by-step instructions on how to login to LGIS that can be found at: <https://usertraining.localgovernmentinformationsystem.gov.bc.ca/lgistraining/Logon-LGIS-Review-Contact-Details.htm>.

LGIS Help Guide

Once in LGIS, you can access the LGIS online Help Guide for information on how to use the system. To access the Help Guide, click the  located on the top right-hand side of the page.



Loading the new LGDE Tax and LGDE Financial Submission Forms

To access the new Local Government Data Entry (LGDE) or Local Government Data Entry Tax (LGDE Tax) forms, take the following steps:

1. Click the **LGDE > Submissions** link on the system menu. The Submissions page appears.
2. Select Submission Type 'Tax' or 'Financial' in the Open Submission section.
3. The "Year" dropdown defaults to the current year. Leave this as it is unless you need to view a previous year's information.
4. Click the **Open** button. The Tax or Financial Submission Form opens.

Note: Currently, local governments are unable to view prior year's LGDE or LGDE Tax forms. To obtain a copy of a prior year's form, please contact us at LGDE@gov.bc.ca. Prior Year forms will be added in the coming months so that you can view LGDE forms back to 2008, and LGDE Tax forms back to 2005.

LGDE Tax and LGDE Financial Submission Helptext

The LGDE Tax and LGDE Financial Submission forms contain detailed "Helptext" to help you enter the information correctly. Whenever you see the  symbol, there is helptext available for that field or section. Click on any  and the helptext pop up window will open. To close the helptext, click the X button or press the esc key to close the window.

Navigating the LGDE Tax and LGDE Financial Submission Forms

Use the 'Tab' key on your keyboard to quickly move through the fields on a form. You can also use the mouse to select a particular field. If you tab to a dropdown list, you can use the up and down arrow keys to scroll through the options, and then use 'Tab' again to make your selection and move to the next field.

If you are scrolled down on a form a Return to Top  button will appear. Select this to quickly return to the top of the form which will allow you to switch tabs or press the save button quicker.

Printing the Forms


Please note that forms are not printing in a very readable (or paper friendly) format. The Ministry is working on implementing a suitable print layout and we anticipate it to be in place by the end of May 2020. We suggest printing to electronic file until printing is functioning in a more readable manner.

Required Fields and Validating Submissions

There is a **Validate** button at the bottom of the forms to check whether there are any missing required fields on the forms. After Validating, if any required fields are missing a message at the top of the screen will indicate the number of missing required fields. The tabs that have missing required fields are also highlighted in pink (see screen shot below). To update or clear the message, you must select the Validate button again.

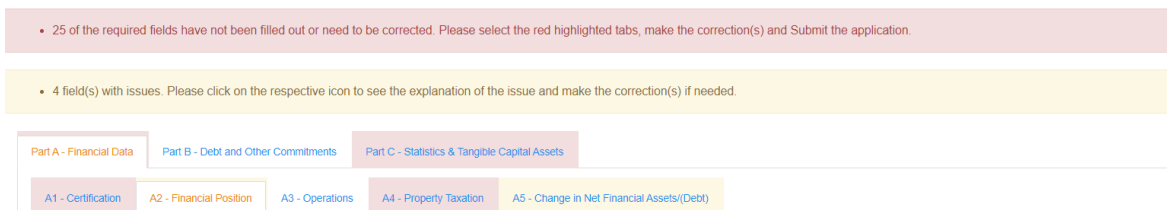
All required fields must be completed prior to submission, or you will not be able to Submit the form. On both forms, required fields have a pink background and calculated fields have a yellow background.

Warning Icons

As information is being entered, you may see warning icons  appear on the form next to some fields. The warning icon represents an issue with the balance of the respective fields. If warning icons appear, you will also see a message at the top of the screen, identifying the number of warning issues present on the form. The tabs that have fields with issues are highlighted in light yellow (see screen shot below).

Note: Warnings can be corrected at any time; however, because warnings appear as you go, the issues may resolve themselves as you finish completing the rest of the tabs. We recommend you finish entering all data on all tabs before reviewing and correcting issues identified by warnings.

It is highly recommended you resolve all warnings before submitting your form. The LGDE Tax or LGDE Financial submission forms can be submitted with warnings; however, Ministry staff may choose to send the form back to you to correct the errors and re-submit. To help you avoid this additional work, if you try to submit with unresolved warnings you will see an additional notice on the Submission Confirmation pop up box indicating there are still issues that may need to be corrected so you can cancel your submission to fix them.



Save Often!

As you progress through a form, you can perform an interim save at any time by clicking the *Save* button at the bottom or the top of the page. The form will also save your data every time you switch between tabs on a form. If you are going to be away from your computer, or plan to finish it later, always save your work.

You will receive a pop up after 96 minutes of inactivity notifying you that you will be timed out of the system after 2 hours of inactivity. Additionally, BCeID requires you to reauthenticate every 2 hours even if you are actively using LGIS. Ensure you are saving often to prevent data losses.


Updated LGDE Help Manuals

The Ministry has updated both the Municipal and Regional District LGDE Help Manuals to incorporate the new fields and schedules within the new LGDE Financial Submission. Both manuals can be found at:

<https://www2.gov.bc.ca/gov/content/governments/local-governments/finance/financial-reporting/financial-reporting-forms>.

Approval Notification & Online History Report

When your LGDE Financial Submission or LGDE Tax Submissions has been reviewed and approved by Ministry staff, a notification email will be automatically sent out to the contact email provided by you on each of the forms.

Once your LGDE Financial Submission has been approved, you can view a detailed list of what changes were made and why by selecting the  button at the top right-hand side of the form. This new History Report will replace the email you previously would receive detailing changes made to your form.


Document Submission

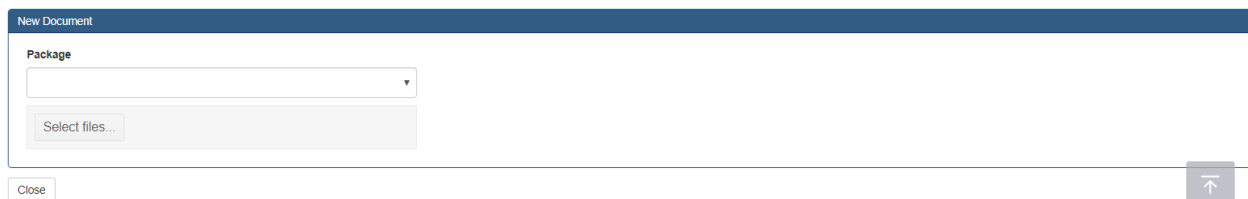
The Document Submission screen allows you to upload the rest of your financial reporting documents. To navigate to Document Submission, take the following steps:

1. Click the **LGDE > Submissions** link on the system menu. The Submissions page appears.
2. Select Submission Type 'Document' in the Open Submission section.
3. The "Year" dropdown defaults to the current year.
4. Click the **Open** button. The Document Submission portal opens.


There are six types of documents you can upload, called document packages:

1. Tax Rate Bylaw
2. Other Tax Documents – any other bylaws or information you wish to submit in relation to your LGDE Tax forms
3. Five-year Financial Plan Bylaw
4. Audited Financial Statements
5. SOFI Report
6. Other Financial Documents – any other documents or information you wish to submit in relation to your LGDE Financial forms

To upload a document, navigate to New Document at the bottom of the Document Submission page. Select the type of Document Package you want to upload, then click 'Select files' to browse your computer to select the document you wish to upload. The document will automatically upload as soon as it's selected and  Done will appear.



The screenshot shows a modal window titled "New Document". Inside the window, there is a "Package" dropdown menu with a downward arrow. Below the dropdown is a "Select files..." button. At the bottom left of the window is a "Close" button, and at the bottom right is an upward-pointing arrow icon.

Once the document is uploaded successfully, the uploaded document will appear on the Documents grid at the top of the page. You can view an uploaded file by selecting the download icon  on the right-hand side.

Ministry Contact Information

If you have any problems, questions, or feedback about the new LGDE system, please contact the Ministry by e-mail at LGDE@gov.bc.ca or by phone at 250 387-4060.