Municipal Sustainability Initiative Operating Portal User Guide

Alberta

Municipal Sustainability Initiative Operating Portal User Guide| Municipal Affairs

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1.0 MSI Operating Portal User Guide Overview

This user guide provides an overview of the steps required to navigate and utilize the Municipal Sustainably Initiative (MSI) Operating Portal. The new MSI Operating portal has been developed to enable municipalities and Métis Settlements to:

- Create, save, and submit MSI Operating Statement of Funding Expenditures (SFE) reporting.
- Access and review MSI Operating financial information including allocations, payments, certified expenditures, and credit items.
- Access commonly used documents including the MSI Operating Guidelines, MSI Operating Portal User Guide, and other important resources.
- Access SFE reports submitted through the MSI Operating Portal (2022 and future SFEs)

  *Please note SFEs submitted before 2022 can be accessed through MAConnect in the Municipal Sustainability Initiative Online (MSIO) System.

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2.0 Accessing the MSI Operating Portal

Municipality and Métis Settlement users are required to have both a MAConnect MSIO account and an Alberta.ca account. The new MSI Operating Portal is accessed through the Municipal Sustainability Initiative Online (MSIO) system within the MAConnect grant portal. To meet the Government of Alberta's security requirements and to access the new portal, users are also required to log into their organizations MyAlberta account.

Set Up a Alberta.ca Account for your Municipality/Métis Settlement

Before accessing the MSI-Operating Portal, you must have an Alberta.ca account.

If your municipality or Métis Settlement does not have an Alberta.ca account, please review the "Alberta.ca account Reference Guide".

To confirm if your organization has a Alberta.ca Account or verify whom your Alberta.ca account Business Administrator is, please contact the Alberta.ca help desk at:
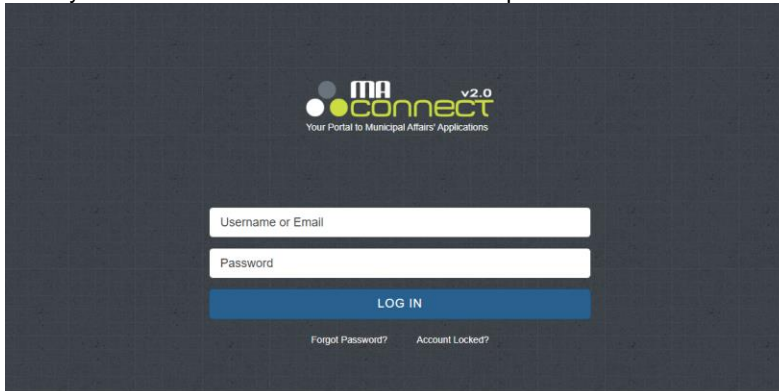
Email: alberta-ca.account@gov.ab.ca

Phone: 1-844-643-2789

Website: https://account.alberta.ca/ui/account/contact

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Log into MAConnect

1. Visit the MAConnect portal at: https://www.maconnect.alberta.ca
2. Enter your MAConnect username or email and password.
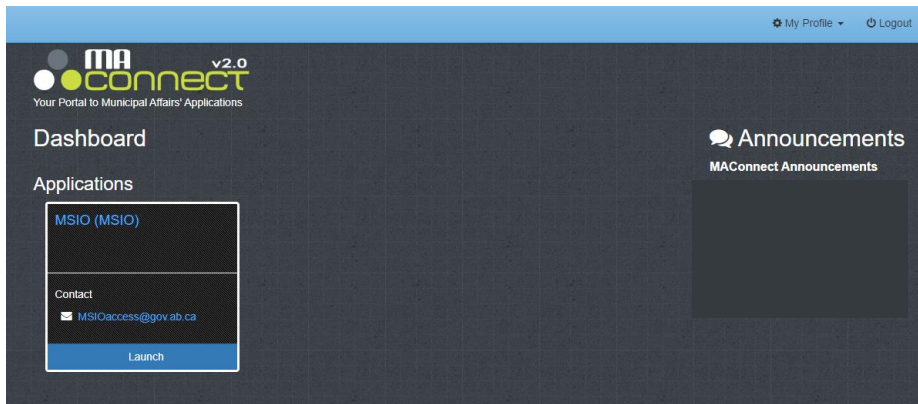
3. Click Log In to access MAConnect.
4. Click the "Launch" button under the MSIO Application, to launch the MSIO system.

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5. Once MSIO is launched, to access the MSI Operating Portal, click on the **MSI-Operating 2022-2023 SFEs** hyperlink in the top right corner in MSIO.
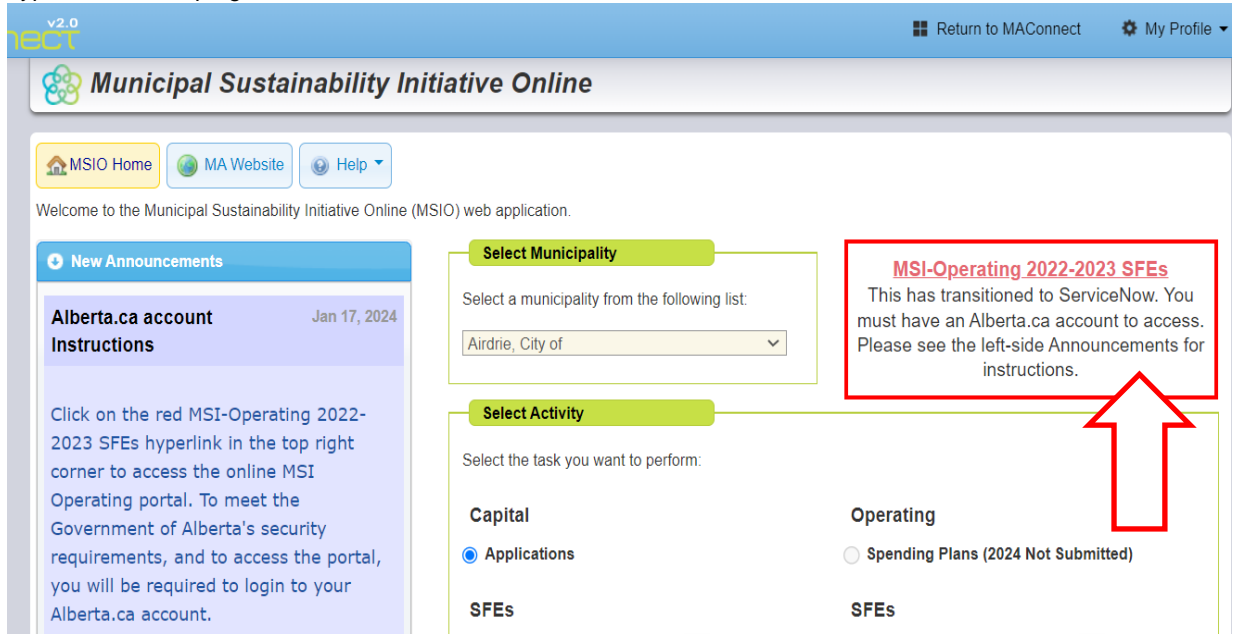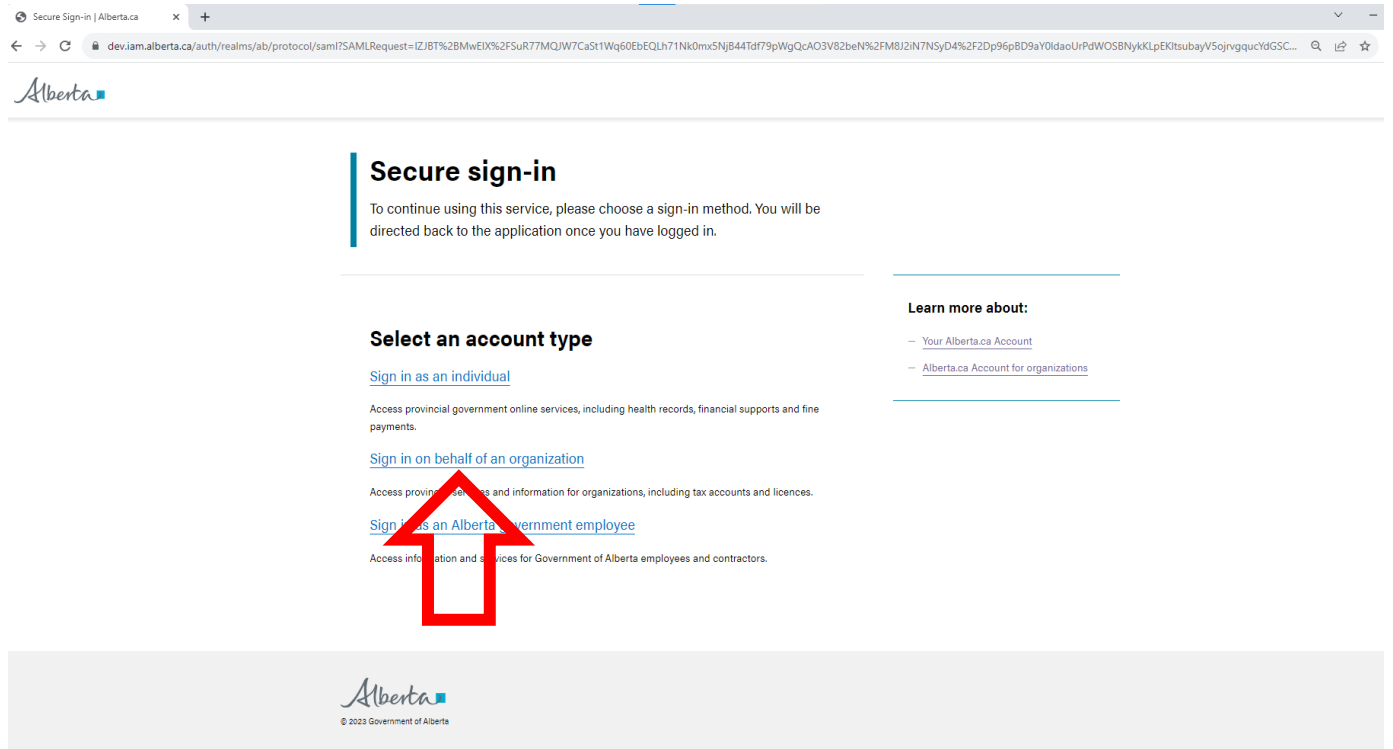

6. The link will redirect you to the Alberta.ca Account Sign-in webpage.

Log into Alberta.ca account to access the MSI Operating Portal

1. To access the MSI Operating Portal, click on the "Sign in on behalf of an organization" button to log into your organization's Alberta.ca Account.

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2. Enter your Alberta.ca account Username and password for your organization (you now have the option to log in with your registered email).
3. Click Log In to access the MSI Operating Portal.

Note: If you get the following portal message when you first log in, you need to request access to the MSI Operating portal.
mailto:

Requesting Access to MSI Operating Portal

1. To request access, click on "View My Items" button under the Request Access section.
2. The Access Request form appears. Select one or more organizations that you represent.
3. Click the "Submit" button.
4. A successful submission message will appear.
5. Once the request is approved, you will receive further instructions about the next steps.

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3.0 MSI Operating Portal Home Page

Once logged into the MSI Operating Portal, the MSI Operating Grant Portal Home Page is displayed.

The Homepage is divided into four sections:

1. **Dashboard**- Displays MSI operating allocations, payments, and expenditure information.
2. **Statement of Funding and Expenditures (SFE)** – Allows users to submit MSI Operating SFEs and displays SFEs submitted through the MSI Operating Portal.
3. **MSI Operating Frequently Asked Questions**- Provides access to the MSI Operating Portal User Guide and other important information.
4. **Request Access** – Allows users to request access for additional municipalities that the user represents.

You can also access MSI Operating Program Guidelines by clicking on the "Here" hyperlink in the top banner of the webpage.
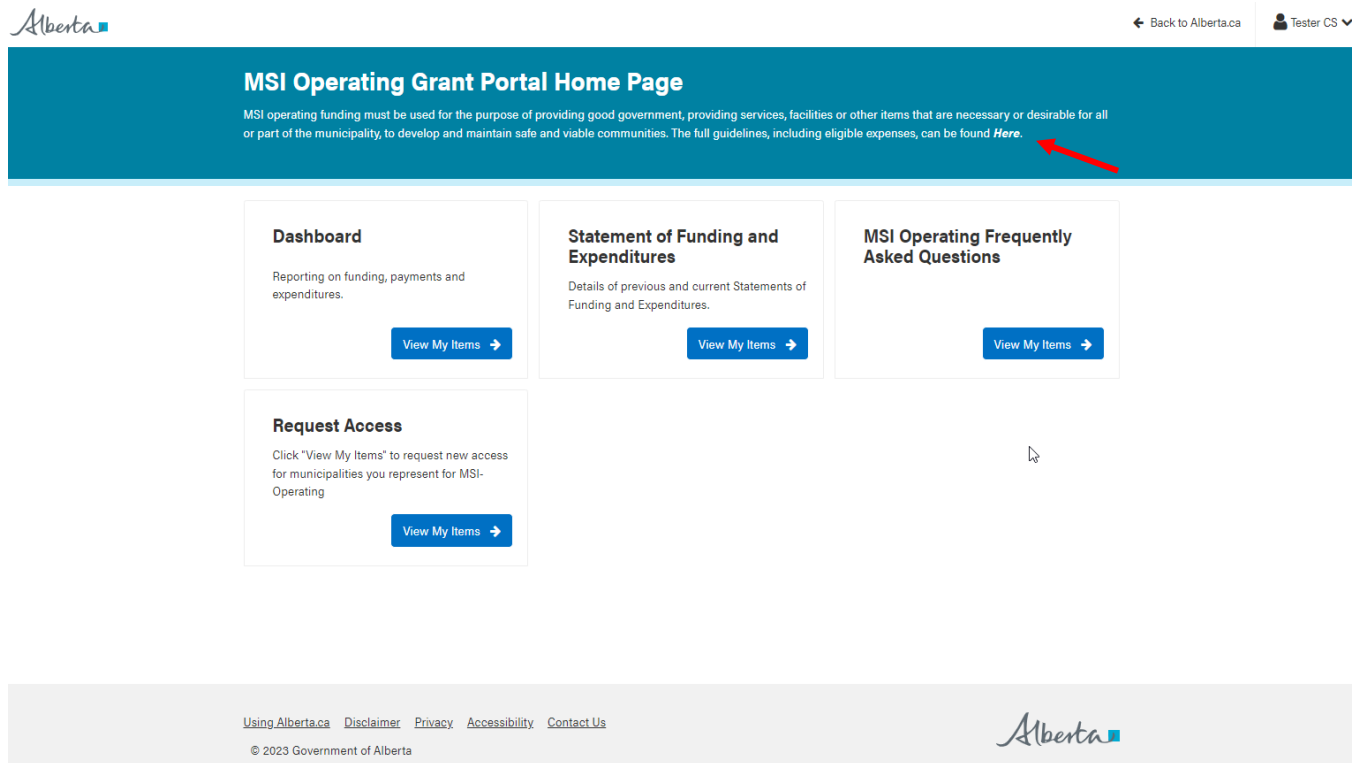
Requesting MSI Operating Portal Access for Additional Municipalities

1. To request access for additional municipalities you represent, click on "View My Items" button under the Request Access section.
2. The Access Request form appears. Select one or more organizations that you represent.
3. Click the "Submit" button.
4. A successful submission message will appear.
5. Once the request is approved, you will receive further instructions about the next steps.

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4.0 Dashboard

The MSI Operating Portal Dashboard page is accessed by clicking on the "View My Items" button under the dashboard heading of the home page. The dashboard provides MSI Operating allocation and financial information.

The Dashboard page is divided into two subsections:

- **Total to Date** provides the 2007 to 2021, and 2022 onwards MSI Operating program roll-up information for allocations, payments, credit items and certified expenditures from.
- **Allocations** provides 2022 onwards annual allocation information.
- **Allocations and Expenditures** provides 2022 onwards annual SFE financial information. All SFEs created/submitted through the MSI Operating Portal are available in the Allocations and Expenditures section.

Total to Date (2007-2021, and 2022 onwards)

The Total to Date section displays 2007 to 2021, and 2022 onwards MSI Operating financial roll-up information for the municipality or Métis Settlement as shown below:

Municipality   Village of ▮▮▮▮▮▮▮▮   ×   ▾

Total to Date (All Amounts in $CAD)				
Organization	Total Municipal Provincial Allocation to Date	Total Provincial Paid	Total Certified Credit Items	Total Certified Expenditures
Village of ▮▮▮▮▮▮▮	965,742	856,846	733	779,815

An overview of each field is provided below:

Organization- Displays the name of the municipality or Métis Settlement. If the user has access to more than one municipality or Métis Settlement, the portal allows users to view financial information from each one by using the drop-down menu.

Total Municipal Provincial Allocation to Date- Displays the total MSI Operating allocations.

Total Provincial Paid- Displays the total MSI Operating allocations paid.

Total Certified Credit Items- Displays the total credit items reported on certified SFEs.

Total Certified Expenditures- Displays the total MSI Operating expenditures reported on certified SFEs.

Allocations (2022 onwards)

The Allocations section displays the allocation for each program year from 2022 onwards.

Please note that the allocation table will be blank until a municipality is selected. Once selected, the program year and allocation columns will be displayed with details as shown below.

Allocations (All Amounts in $CAD)	
Program Year ⌄	Allocation
2023	277,718
2022	138,859
‹ › Rows 1 - 2 of 2	

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An overview of each field is provided below:

Program Year: Displays the program year of the Allocation

Allocation: Displays the MSI Operating allocation for each year.

Allocations and Expenditures (2022 onwards)

The Allocations and Expenditures section displays 2022 and onward MSI SFE information sorted by program year. The information includes SFE status, allocations, payment information, and SFE financial information. A detailed overview of each field is provided below.

Please note allocation and expenditures rows will be blank until the program year SFE is created. Once a record displays in the table below, double-click on the row to open and view the SFE form.

Allocations and Expenditures (All Amounts in $CAD)

Program Year	Provincial Paid	SFE Status	Carry Forward From Previous Year (A)	Funding Available in Reporting Year (B)	Credit Items (C)	Total Funding Available in Reporting Year (D=A+B+C)	Total Expenditures	Carry Forward To Next Year
2022	0	Draft		344,076	5	344,081	344,001	80

Rows 1 - 1 of 1

An overview of each field is provided below:

Program Year- Displays the program year of the Allocation and SFE.

Provincial Paid- Displays the MSI Operating payment amount for the program year.

SFE Status- Displays the status of the program year SFE.

Carry Forward From Previous Year (A)- Displays the MSI Operating carry forward amount from the previous year's SFE (e.g., 2021).

Funding Available in Reporting Year (B)- Displays the MSI Operating allocation for the program year.

Credit Items (C)- Displays the reported credit items on the program year SFE.

Total Funding Available in Reporting Year (D=A+B+C)- Displays the total MSI Operating amount available in reporting year (Calculation = Carry Forward from Previous Year (A) + Funding Available in Reporting Year (B) + Credit Items (C)).

Total Expenditures- Displays the total MSI Operating expenditures reported on the SFE.
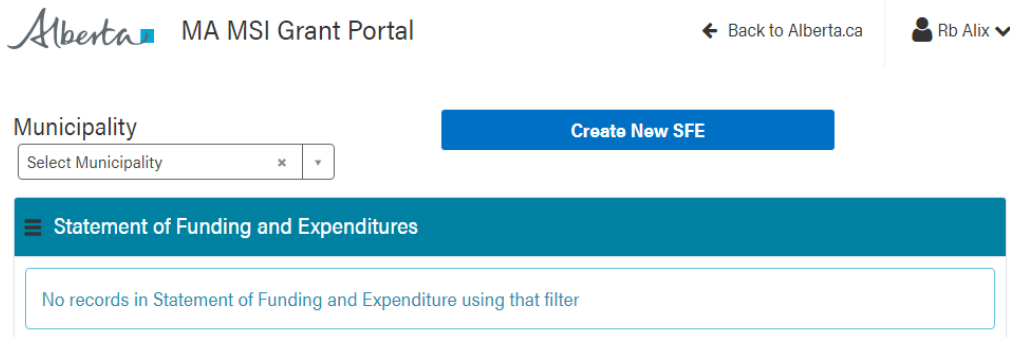
Carry Forward To Next Year- Displays the total MSI Operating Carry Forward amount (if applicable) that will be populated on the subsequent year SFE. (Calculation= Total Funding Available in Reporting Year (D=A+B+C+) - Total Expenditures).

5.0 Statement of Funding and Expenditures (SFE)

The Statement of Funding and Expenditures (SFE) page is accessed by clicking on the "View My Items" button under the Statement of Funding and Expenditures heading on the MSI Operating Portal Home Page.
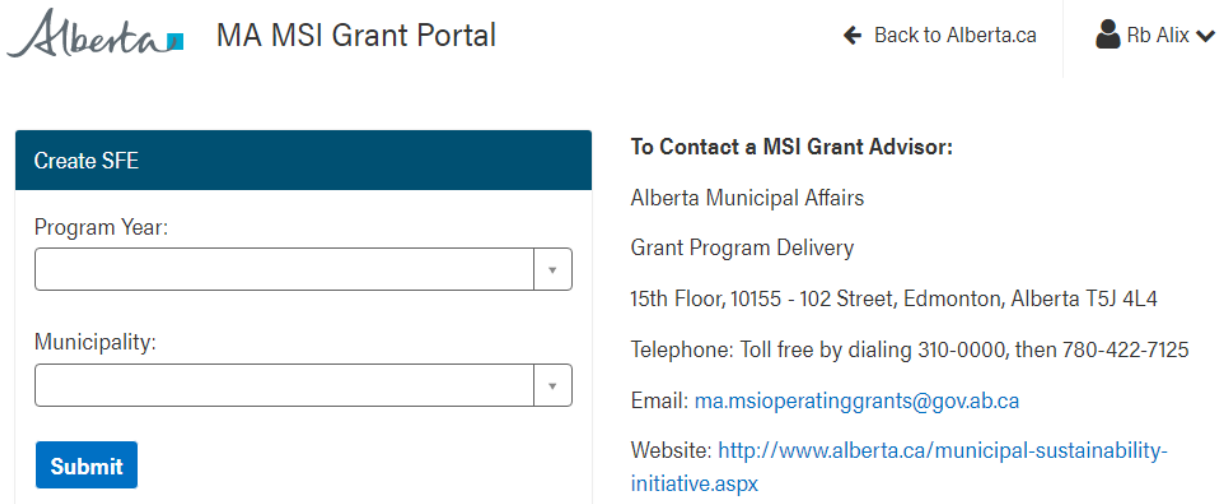
Create a New SFE

1. Once on the SFE page click, Create New SFE.

2. Select the corresponding Program Year from the dropdown list.
3. Select the municipality or Métis Settlement from the dropdown list.
4. By clicking Submit, you will be navigated to the SFE data entry page.

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SFE Sections

Users are required to populate fields within the following sections:

- Primary SFE Contact Information
- MSI Operating Funding Available and Expended
- Operating Funding Expended
- Submission of Certification

All mandatory fields are highlighted with an asterisk (*).

Primary SFE Contact Information

1. Enter your First Name*
2. Enter your Last Name*
3. Enter your Phone Number (XXX-XXX-XXXX)*
4. Enter your email address (e.g., name@abctown.ca)*.

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MSI Operating Funding Available and Expended

The MSI Operating Funding Available and Expended section consists of pre-populated and calculated fields.

1. Review each field and re-confirm information.
2. Enter any Credit Items (C) (if applicable).

An overview of each field is provided below:

Program Year- Displays the SFE program year that the user is working on. The field is read-only.

Carry Forward From Previous Year (A)- Displays any MSI Operating carry forward amount from the previous year's SFE. The field is auto populated and read-only.

Funding Available in Reporting Year (B)- Displays the MSI Operating allocation for the program year.

Credit Items (C)- Users can enter their credit items in the Credit Items (C) field. The field is editable. If you have no credit items, enter $0.

Total Funding Available in Reporting Year (D=A+B+C)- Displays the total MSI Operating available for the program year. The field is a calculated value.

Total Expenditures- This section updates automatically when the Operating Functional Categories section below is completed.

Carry Forward To Next Year- Displays any unspent MSI Operating funding at the end of the year. The field is a calculated value. Calculation = Total Funding Available in Reporting Year – Total Expenditures.

3. Once you have reviewed and entered the required information, scroll to the bottom of the SFE page and click the "Save (Ctrl +S)" button to save your progress.

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Operating Functional Categories (Funding Expended)

To enter your MSI operating expenditures for the program year, you must access the Operating Functional Categories page. See **page 18** if you do not have any Operating Functional Categories to report.

1. To access the Operating Functional Categories page, navigate to the very bottom left side of the SFE page.
2. Click on the "Operating Functional Categories" hyperlink.

3. Select the appropriate Functional Category by using the drop-down arrow.
4. Enter the MSI Amount Expended (required) for the Functional Category in the Amount Expended field. This field only accepts whole numbers (no decimals).

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5. The following read-only fields will display:
   a. **Total Funding Available in Reporting Year (D=A+B+C)** (value from the SFE form);
   b. **Total Expenditures** (for all expenditures entered on the SFE form); and
   c. T**otal Operating Funding Remaining** (a – b).

6. Click Save and the following fields will now be updated and displayed:
   a. Total Expenditures
   b. Total Operating Funding Remaining.

7. After saving the record, the Operating Functional Categories table will display. Click on the Functional Category hyperlink to view the Functional Category record. Click the "Back" button to return to the Operating Functional Categories table.

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MA MSI Grant Portal

← Back to Alberta.

Home > Statement of Funding and Expenditure > Operating Functional Categories

≡ Operating Functional Categories [New]

Functional Category	Statement of Funding and Expenditure		Amount Expended
Airports	2022-0281-	I-SFE	1,000
Children and Family Services	2022-0281-	I-SFE	2,000

8. To add additional functional categories, repeat the previous the steps 3 to 6.
9. If an operating functional categories record has been entered in error, click on the Functional Category record, and click the "Delete" button to remove it. The Operating Functional Categories table will display.
10. After all functional category records have been confirmed, click on the Statement of Funding and Expenditure hyperlink to navigate back to the SFE form

MA MSI Grant Portal

← Back to Alberta.ca

Home > Statement of Funding and Expenditure > Operating Functional Categories

≡ Operating Functional Categories [New]

Functional Category	Statement of Funding and Expenditure		Amount Expended
Airports	2023-0075-	SFE	90

11. Next review the MSI Operating Funding Available and Expended section of the SFE form and confirm the fields are populated with the correct financial information.

MSI Operating Funding Available and Expended

Program Year

| ⓘ 2022 | ▾ |

Carry Forward From Previous Year (A)

Total Funding Available in Reporting Year (D=A+B+C)

344,086

Funding Available in Reporting Year (B)

344,076

Total Expenditures

50,000

Credit Items (C)

10

Carry Forward To Next Year

294,086

_____

Submit the SFE

Once you have reviewed and confirmed the financial information on the MSI Operating SFE, the SFE can be submitted to Municipal Affairs.

To submit the SFE:

1. Use the drop-down menu to select the Certification Type.
2. Next review the Attestation.
3. If you do not have any Operating Functional Categories to report, click the first checkbox. Once this checkbox is checked, the "Operating Functional Categories" hyperlink will not display at the bottom of the page. To add Functional Categories, this box will need to be unchecked first.
4. If you agree with the statement, click on the second checkbox to certify the Attestation statement selected above to be true.

Certification

Generated by

🛈 | Tester CS | ▾

Organization Name *

🛈 | | ▾

Date

2023-06-12

Certification Type

Chief Administrative Officer Attestation | ▾

Chief Administrative Officer Attestation

I, the CAO, certify that the information contained in this Statement of Funding and Expenditure is a true and correct representation of actual funding, expenditures and total carry-forward. This information complies with the MSI Operating Program Guidelines and funding agreements for this grant program.

☐ Click this box to confirm that no Operating Functional Categories are required

☐ By Clicking "Submit" I certify the statements selected above to be true.

5. Navigate to the bottom of the SFE page.
6. Click on Save. When you save the SFE, it will be in a draft status. In draft status, the user can retrieve it later to review, update, and/or submit.
7. If you are ready to submit the SFE, click on the "Submit" button.

Legal Disclosure

The personal information provided on this form or on any attachments is required for the purpose of administering the Municipal Sustainability Initiative (MSI) program. Your personal information is collected under the authority of section 33(c) of the Freedom of Information and Protection of Provacy (FOIP) Act and will be managed in accordance with the privacy provisions under the FOIP Act. If your Statement of Funding and Expenditures form is certified by Municipal Affairs, your name, the grant program and the actual amount of the grant expended may be published by the Government of Alberta as authorized under section 40(1)(b) and (f) of the FOIP Act. Should you have any questions about the collection, use, or disclosure of your personal information, you may contact the Director, Grant Program Delivery, Alberta Municipal Affairs, 15 Floor, 10155-102 Street, Edmonton, Alberta, T5J 4L4.

Related Lists
Operating Functional Categories

| Submit | | Save (Ctrl + s) |

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8. Once the SFE is submitted, click the Home hyperlink at the top of the SFE form to go to the dashboard.

9. Click on the "View My Items" under the Statement of Funding and Expenditures section to view the SFEs.
10. To open and view the SFE form, click on the row.

Generate the SFE Report

The SFE report is generated by clicking on the "Generate SFE Report" button on the SFE form.

1. Click on the Generate SFE Report to access the report.

2. The report will be displayed under the Attachments section on the left-hand side. Click on the downloaded PDF attachment hyperlink to access the SFE report.

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Note: The SFE report is saved as an attachment and will not automatically update to display real time edits/updates. When a change is made to the SFE form, users must re-generate the SFE report and click on the web browser refresh button (or press F5 on the keyboard) to ensure all SFE edits/updates are recorded.

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6.0 MSI Operating Frequently Asked Questions

The MSI Operating Frequently Asked Questions page is accessed by clicking on the "View My Items" button under the MSI Frequently Asked Questions heading on the Home Page.

Users can access documents including the MSI Operating Portal User Guide.

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7.0 Where Can I go for Additional Support?

For questions and support regarding MSI Operating questions:

Phone: Toll free by dialing 310-0000, then 780-422-7125
Email: ma.msioperatinggrants@gov.ab.ca
Website: http://www.alberta.ca/municipal-sustainability-initiative.aspx

For system questions and support regarding MAConnect or MSI Operating System Support:

Phone: Toll free by dialing 310-0000, then 780-644-2413
Email: MSIOaccess@gov.ab.ca

For questions and support regarding MyAlberta account:

Phone: 1-844-643-2789
Email: alberta-ca.account@gov.ab.ca
Website: https://account.alberta.ca/ui/account/contact

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8.0 SFE Notifications

The MSI Operating Portal will provide notifications during the MSI Operating program year. These notifications include the opening of a program year SFE, SFE submission reminders, notice of a returned SFE, and notice of SFE certification.

Examples Include:

Program Year SFE Open

Chief Administrative Officers will receive an email when the program year SFE is available for submission on the MSI Operating Portal.

SFE Submission Reminder

Chief Administrative Officers will receive an email one month prior to the annual May 1 SFE due date. This email is sent as a reminder to all municipalities and Métis Settlements that have not submitted their MSI Operating SFE.

Municipalities and Métis Settlements may receive additional reminder emails if an SFE has not been submitted after 30, 60, and 90 days after the May 1 deadline has passed. Once the SFE has been submitted to Municipal Affairs, no further reminder emails will be sent.

SFE Returned for Revision Notice

Primary SFE Contacts will receive an email if the SFE is returned for revisions. Returned SFEs will appear in the MSI Operating Portal in a draft status. Users can follow all the steps outlined in the Statement of Funding and Expenditures to make any required edits/updates and resubmit the SFE.

SFE Certification Notice

Primary SFE Contacts will receive an email once the MSI Operating SFE has been certified by Municipal Affairs.

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