
LGS Portal Registered User Guide

November 17, 2015

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Registered Users

Beginning August 2015, Montana’s local governments were asked to submit an electronic copy of their Annual Financial Reports, Audit & Financial Review Reports, and Contracts for FY2015 and their FY2016 Budget Documents through the LGS Local Government Entity Portal.

This user guide provides instructions for local government representatives and auditors who are responsible for submitting financial reports and related documents for their associated entity(s).

Registering with a Local Government

In order to upload reports and related documents, and fill in editable fields within the Audits and Financial Reviews, Contracts and Budgets sections of the portal, you will need to register with the local government(s) you are associated with.

Logging in through ePass Montana

If you are already a registered user, or you want to begin the registration process, select Login using ePass Montana at the top right of the portal homepage. (Figure 1)



Figure 1: Login Button

Once you select the **Login** button you will be taken to ePass Montana. Sign in with a current ePass account or create a new one. (Figure 2)

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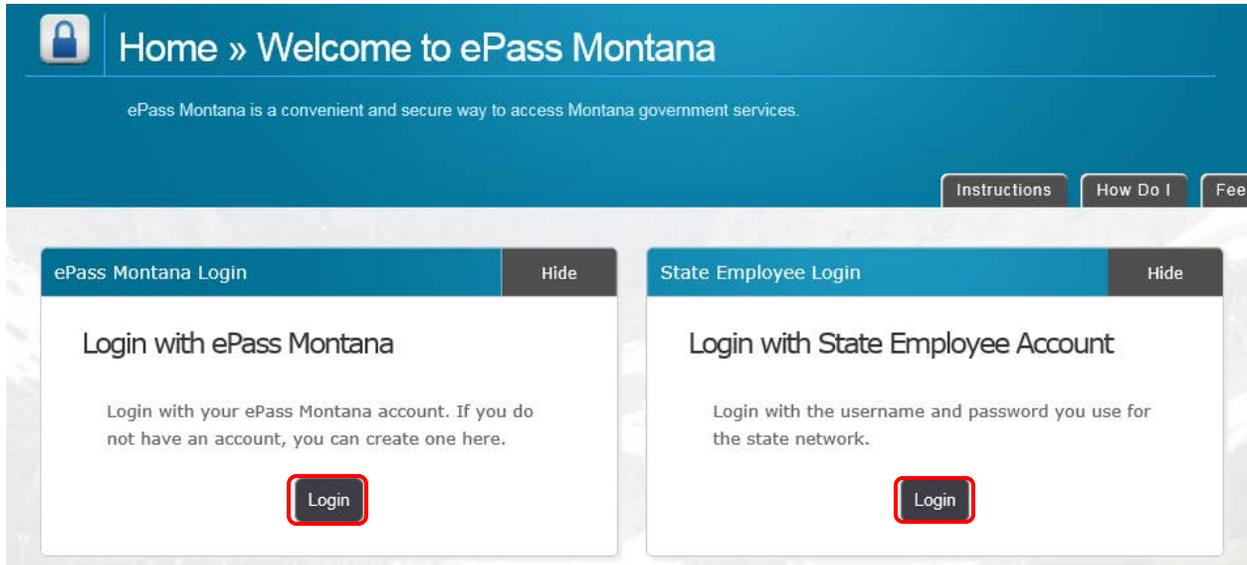


Figure 2: Login Screen for ePass Montana

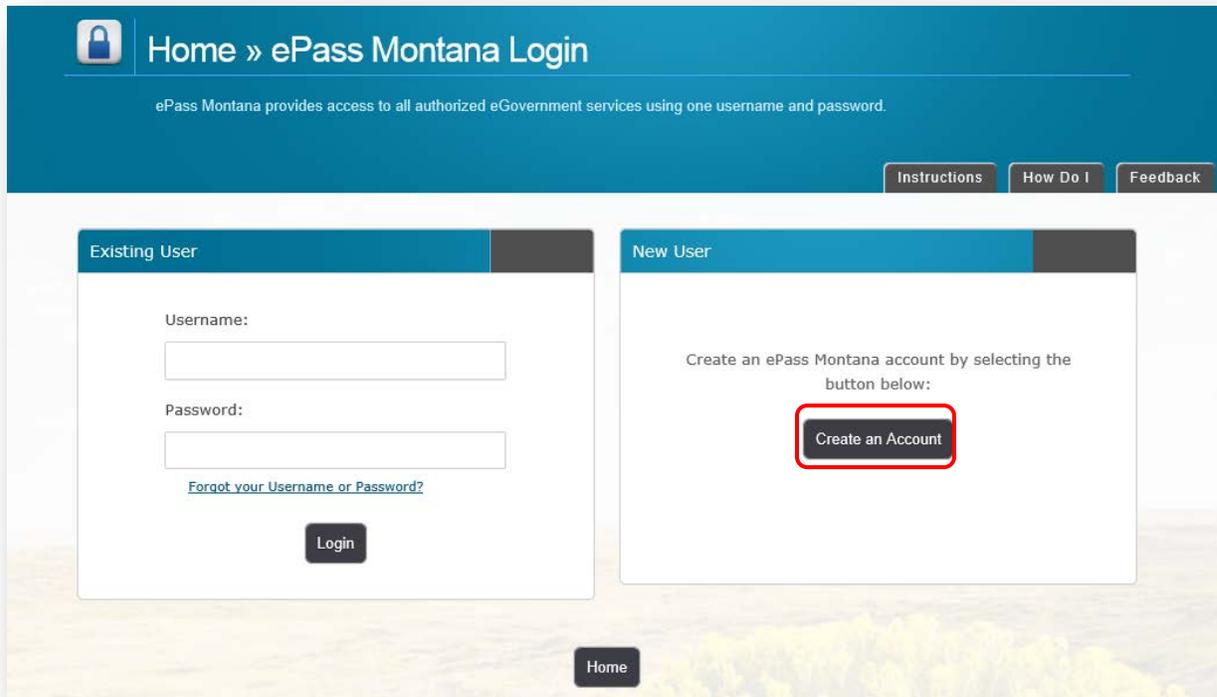


Figure 3: Different Login Areas Depending on User Type

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New User Login

A new user will click the **Create an Account** button, displayed in Figure 3.

A new screen will appear (Figure 4) and the new user will be required to fill out the information needed in the **Personal Information**, **ePass Montana ID Details**, and **Security Info** sections.

Note: Leave the *Registered User Information* section blank.

Home » Create ePass Montana Account

ePass Montana provides access to all authorized eGovernment services using one username and password.

Instructions How Do I? Feedback

Important – About your username and password. Username must be at least 6 characters long, password must be at least 8 characters long, password must use both letters and numbers, password must be different than your username, password is case sensitive.

Cancel Save Changes

Personal Information

*First Name:

*Last Name:

Daytime Phone:

*Primary Email:

*Verify Primary Email:

Alternate Email:

ePass Montana ID Details

*Username:

*Password:

*Verify Password:

*Password Hint:

Security Info

For your protection, these questions will help us verify your identity in the future.

*1. Security Question:
Choose one ...

*2. Security Question:
Choose one ...

*3. Security Question:
Choose one ...

Registered User Information

If you have a Registered User account, please provide your Registered User login information. [What is a Registered User account?](#)

Registered User Login:

Registered User Password:

Cancel Save Changes

Figure 4: Information Needed by a New User to Create an Account

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Once you press **Save Changes** the Default Display of the portal Home page will be displayed (Figure 5).

You will notice that the Login button has disappeared and **(your name) [unregistered] Logout | ePass Montana Home** is there instead.

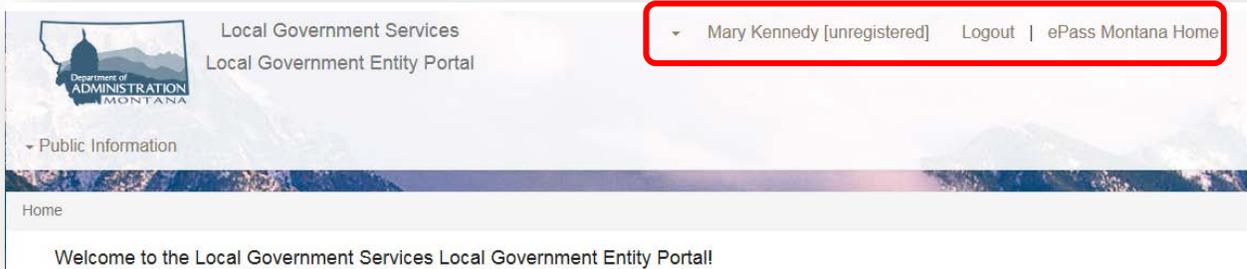


Figure 5: New User Home Page Display after Registering

If the default portal page did not display, you may need to select or add the portal’s link (<https://lgs.mt.gov>) to “Your Services”, in ePass. If you don’t see the Portal’s name under “Add a Service” press the Edit button and fill in the URL and Link Name under “My Favorites” (Figure 6).

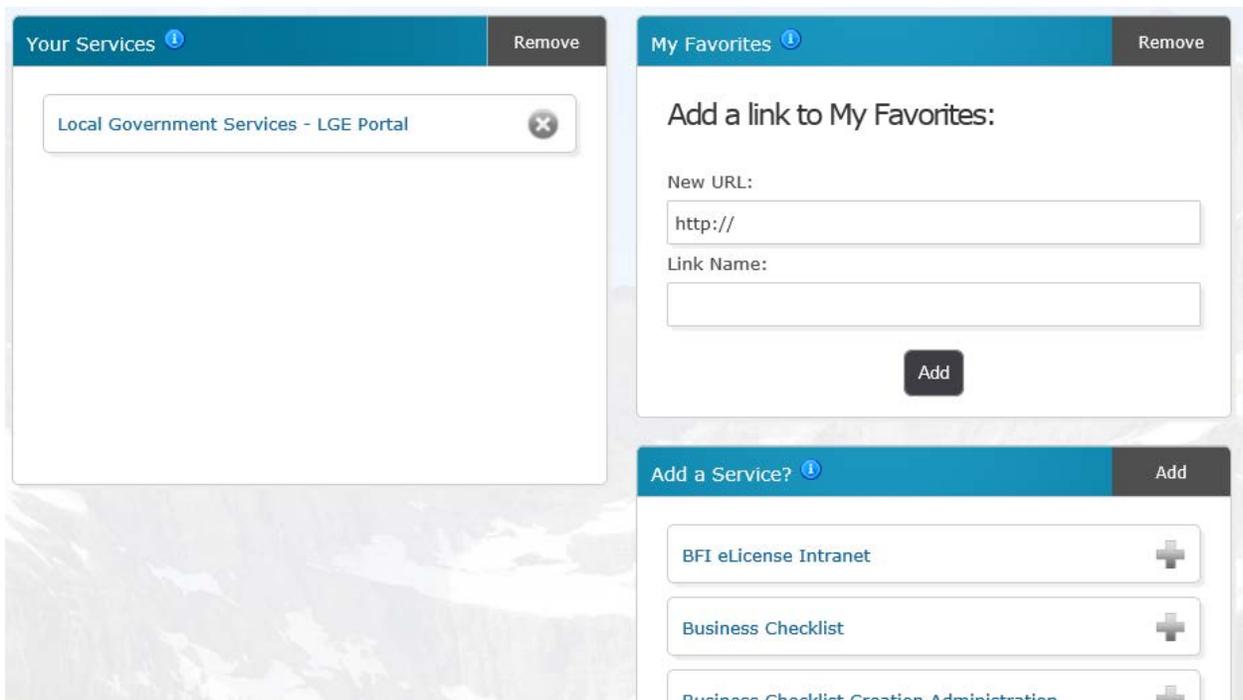


Figure 6: Your Services Page (ePass Montana)

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If the Default Display of the portal’s Home page (Figure 5) did not repopulate after you hit the **Save Changes** button, return to the Public User’s portal Home page and select the Login button to log in. (Figure 2.)

[New User Registering with one or more Local Government Entities](#)

To register with a local government entity, select the down arrow next to your name and choose **Register With Entity...** from the dropdown selection.

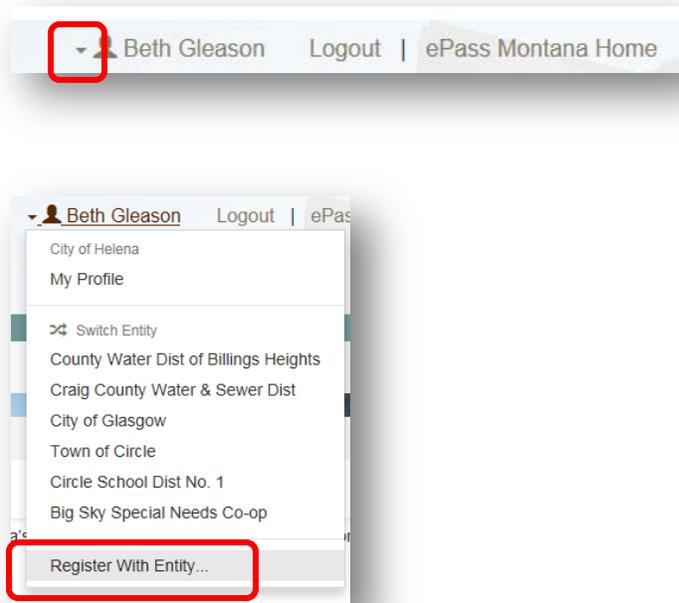


Figure 7: Register With Entity

You will then be required to fill out the **Contact Information** and **Entity Information** sections of the screen (Figure 8). Note: You can choose the local government entity by either using the search icon , or by typing part of the local government’s name in the search box. Also, the red asterisks * were copied over from our database and don’t mean anything for the portal. However, we would like all fields filled in, including Job Title.

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Home / Register

Register

CONTACT INFORMATION

First Name * Beth

Last Name * Gleason

E-mail * brittano@mt.gov

Phone * 4064616629

ENTITY INFORMATION

Entity * ...

Job Title

Register

Figure 8: User Registration Form

Once you select the Entity and fill out the information needed for the form, press the **Register** button in Figure 8. You will receive a message (Figure 9) informing you that your Registration is pending. Until someone with the LGS approves you, you will not be registered to the Entity you have chosen. **Note:** to register for another Entity, follow the steps above.

Your Registration with **Alberton K-12 School Dist No. 2** is currently pending. You will receive an email when your registration has been approved.

Figure 9: Pending Registration Message

[Email from LGS approving registration](#)

Once the LGS approves your registration, a confirmation email will be sent to you at the email address you registered with in ePass. (Figure 10)

Thank you for registering with the **LGS Local Government Entity Portal!**

This email confirms that your registration with [\[insert LGE name\]](#) has been reviewed and approved by the State of Montana Local Government Services Bureau. Once you log into the portal and select your registered Local Government Entity, you will be able to submit documents and complete designated portions of forms online.

Please visit our Portal Resources page - <http://sfsd.mt.gov/LGSB/LGSPortal> for instructions on how to upload and submit documents.

If you have any questions or need assistance, please contact the Local Government Services Bureau at LGSPortalRegistration@mt.gov.

Figure 10: Email verifying your registration with a local government entity.

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[Registered/Approved User’s Home Page](#)

Once you have registered with an entity and the LGS has approved your registration, the next time you login through the Public User’s portal, your home page will display your name and the local government entity you registered with. You will also notice that you have more navigation links listed horizontally across the page. The new navigation links display only those records for the entity you registered with. (Figure 11)



Figure 11: Default Display for an Existing/Returning User

[Switching between the Entities you’re registered with](#)

If you are registered with more than one entity, you can switch between them using the drop down arrow in front of your name. (Figure 12)

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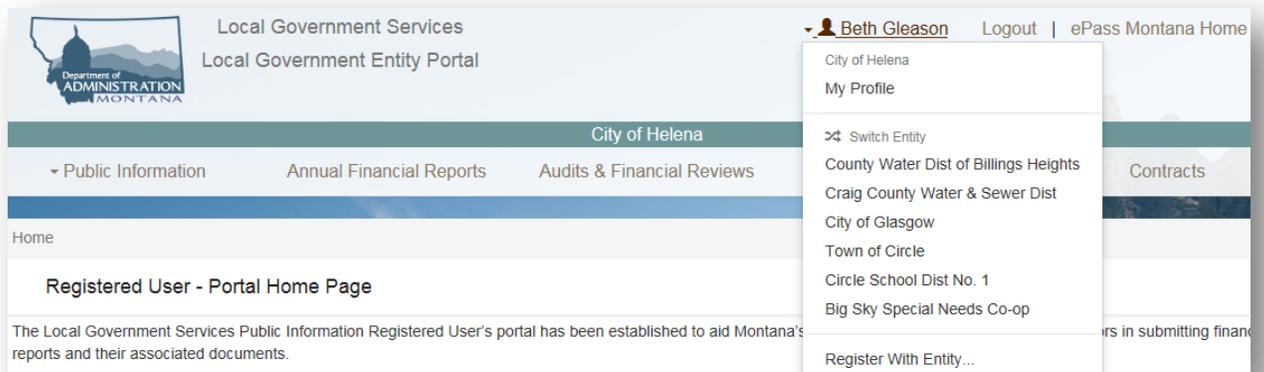


Figure 12: Switching between Entities

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Navigation

A registered user can navigate back to all Public records by using the Navigation links under the **Public Information** drop down menu (Annual Financial Reports, Audits and Financial Reviews, Budgets, and Reports). Note: the Public Information drop down menu does not include Contracts, although Contract field information can be viewed in the Audits and Financial Reviews records.

A registered user can view all records based on the selected Entity they are registered with by selecting one of the navigation links highlighted **green** in Figure 13.

The user will also be able to use the Breadcrumb Navigation links once they are within a page to return to the previous page or to the Home page, highlighted **blue** in Figure 13.

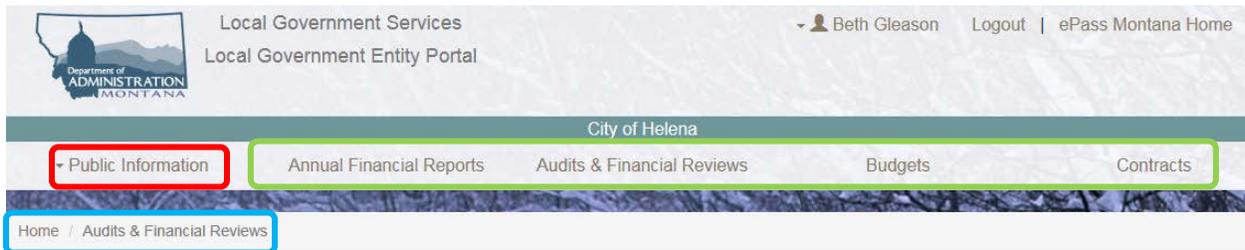


Figure 13: Red – Public Navigation Links, Blue – Breadcrumb Navigation Links, Green – Entity Records

For more Navigation tips, see the LGS Portal Navigation Guide, located on the [LGS Portal Resources](#) web page.

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Uploading & Submitting Reports and Associated Documents

AFRs/DLLs

There are no editable fields for registered users to fill in on the [Annual Financial Reports](#) report form. If your entity's total revenues cause you to have a filing fee, print the Filing Fee form and mail with your check to the Local Government Services Bureau. See [Appendix 3](#) for instructions.

- [Special Purpose Districts](#) - Once your AFR is uploaded through the portal, the LGS can review it for acceptance. Upload your AFR timely to avoid delinquency fees. If your report is delinquent, only after the Bureau accepts your AFR will delinquency fees cease.
- [Counties, Cities and Towns](#) - Once your AFR and DLL* are uploaded through the portal, the LGS can review them for acceptance. Upload your document(s) timely to avoid delinquency fees. If either report is delinquent, only after acceptance of both documents will delinquency fees cease. Note: If you do not submit your AFR and DLL at the same time, refer to [Appendix 3](#), Additional Documents section.

*Counties, Cities and Towns are the only entities responsible for submitting a DLL (or Database Ledger Load).

Form Field Errors

Fields that are filled in are connected to the LGS – CRM database. If you find any errors in the report form fields, email the [Help Desk](#) or contact someone at the LGSB.

Form Field Descriptions

See [Appendix 1](#), *Report Forms and Definitions* section of this document for a description of the form fields.

Form Fields Completed by Auditor or Entity

The [Audits and Financial Reviews](#), [Budgets](#) and [Contracts](#) have form fields that you need to complete before you can upload your documents. You may edit the information you type into these fields up until you press the second **Submit** button. (See #8, below, under [How to Upload Documents](#) for more information regarding this Submit button.)

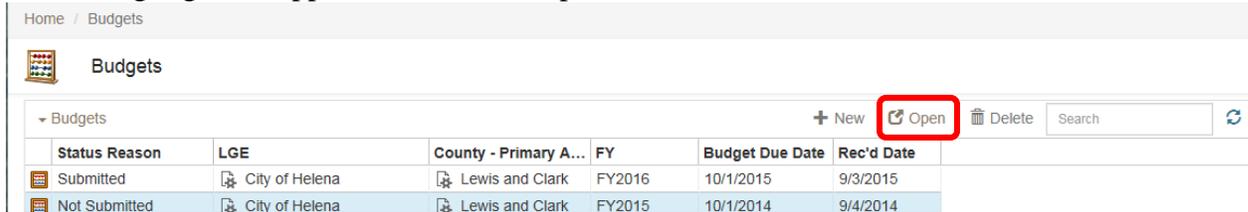
To complete the form fields, do the following:

1. Press the *applicable* navigation link.

City of Helena				
Public Information	Annual Financial Reports	Audits & Financial Reviews	Budgets	Contracts

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2. Highlight the applicable record and press  Open .



Home / Budgets

Budgets

▼ Budgets + New  Open Delete Search

Status Reason	LGE	County - Primary A...	FY	Budget Due Date	Rec'd Date
Submitted	City of Helena	Lewis and Clark	FY2016	10/1/2015	9/3/2015
Not Submitted	City of Helena	Lewis and Clark	FY2015	10/1/2014	9/4/2014

Audits and Financial Reviews

Fill in all **Audit Report Transmittal Information** fields before uploading your document.
Note: because you're filling in these form fields on-line, you will no longer need to submit a separate Audit Transmittal Sheet.

See Uploading a Document, below.

Audit Report Transmittal Information

Actual Hours Involved in Conducting Audit/Financial Review	<input type="text"/>	Opinion Date of Report	<input type="text"/>
Total Fee Billed to Entity	<input type="text"/>	Date Final Report Delivered to Entity	<input type="text"/>
Federal Program Audit	<input type="radio"/> Yes <input checked="" type="radio"/> No		

Budgets (Counties, Cities, and Towns)

Fill in the applicable **Values** fields before uploading your document.

Note: Counties should fill in all fields, whereas Cities and Towns don't need to fill in the **Road Taxable Value**.

See Uploading a Document, below.

Values

Total Market Value	<input type="text" value="\$ 3,398,076,199"/>	Total Taxable Value	<input type="text" value="\$ 61,254,920"/>
Road Taxable Value (Counties only)	<input type="text" value="\$ 0"/>		

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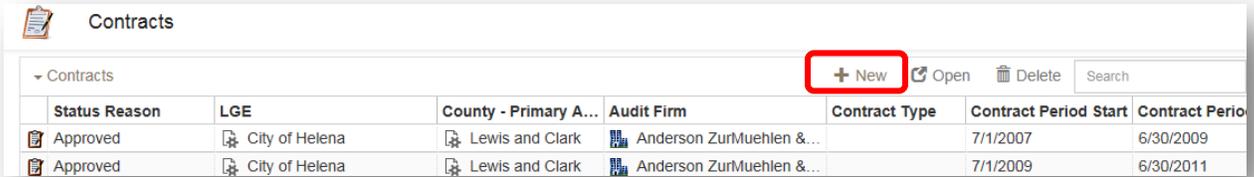
Contracts (for Audits and Financial Reviews)

If the Contract record was created previously, highlight the applicable record and press

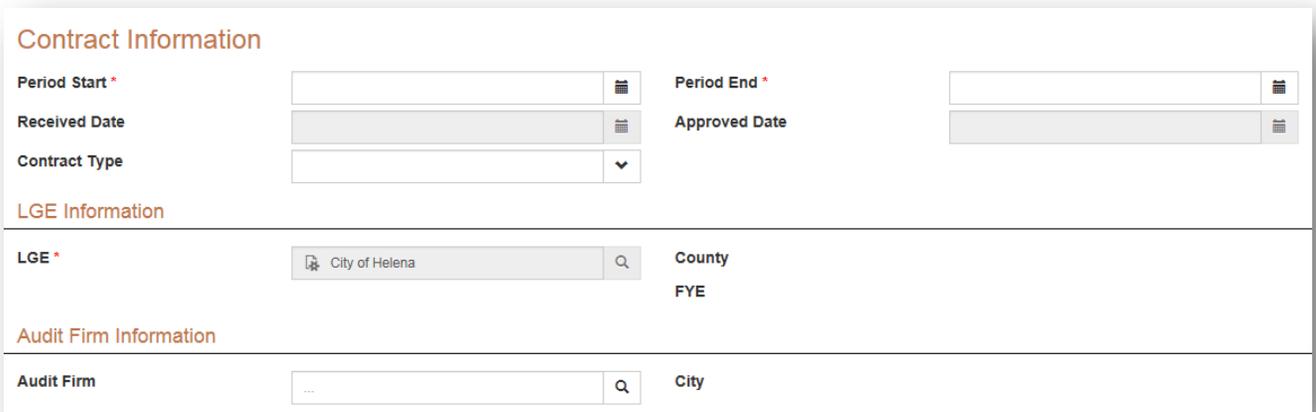
 Open .

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If you don't see the Contract record, you will need to create a new record by pressing **+ New** and filling in the **Contract Information** fields that are white and the **Audit Firm** field. See *Uploading a Document*, below.



Status Reason	LGE	County - Primary A...	Audit Firm	Contract Type	Contract Period Start	Contract Perio
Approved	City of Helena	Lewis and Clark	Anderson ZurMuehlen &...		7/1/2007	6/30/2009
Approved	City of Helena	Lewis and Clark	Anderson ZurMuehlen &...		7/1/2009	6/30/2011



Contract Information

Period Start * Period End *

Received Date Approved Date

Contract Type

LGE Information

LGE * County

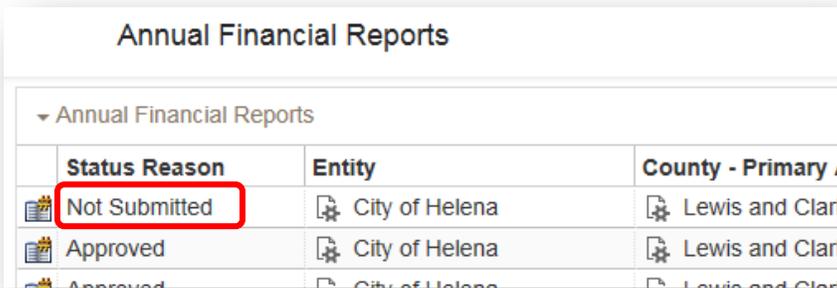
FYE

Audit Firm Information

Audit Firm City

[How to Upload Documents](#)

1. **Before opening the record**, make sure the **Status Reason** says “Not Submitted”. If it doesn't, please email the Help Desk or call the LGS to reset. You cannot upload a report if the Status Reason is anything other than “Not Submitted”. **Note:** the Bureau would prefer that you send additional documents through email or the File Transfer Service.



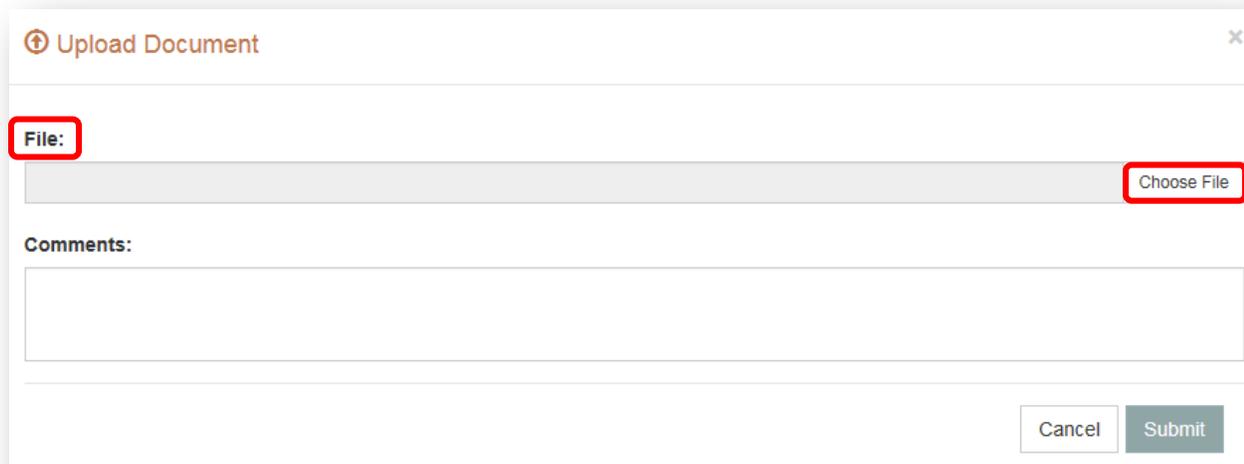
Status Reason	Entity	County - Primary A
Not Submitted	City of Helena	Lewis and Clark
Approved	City of Helena	Lewis and Clark
Approved	City of Helena	Lewis and Clark

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2. Go to the **Documents** section at the bottom of the portal form and press **+ New**.



3. Under **File:**, press **Choose File** to search for the file you would like to upload.



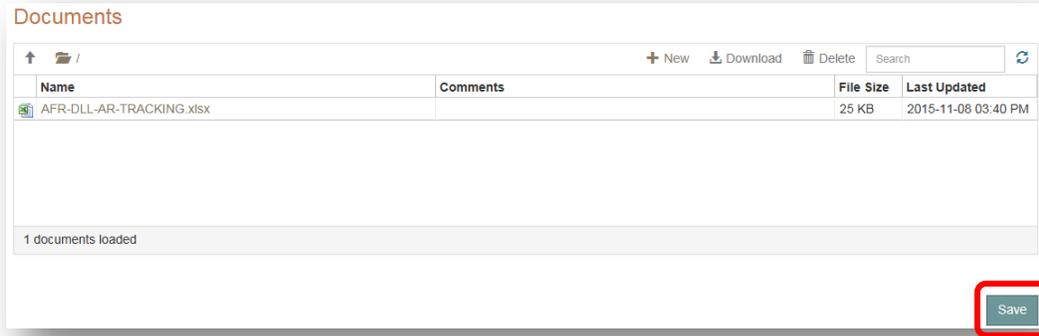
4. Press **Submit** once you have attached the file.

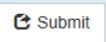


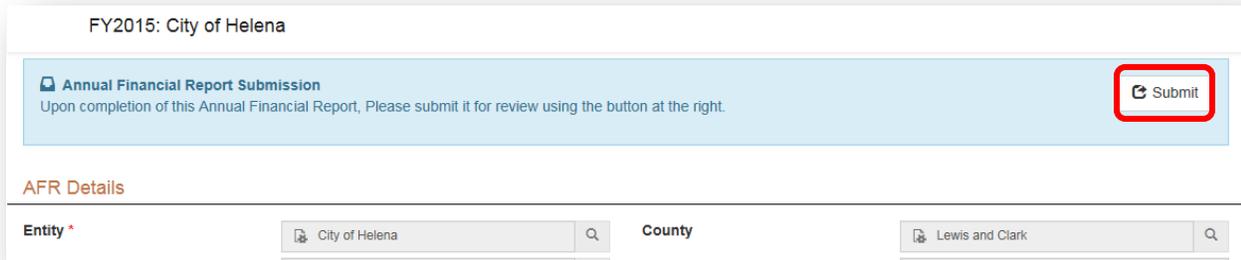
5. Repeat the first 3 steps until you have uploaded all documents.

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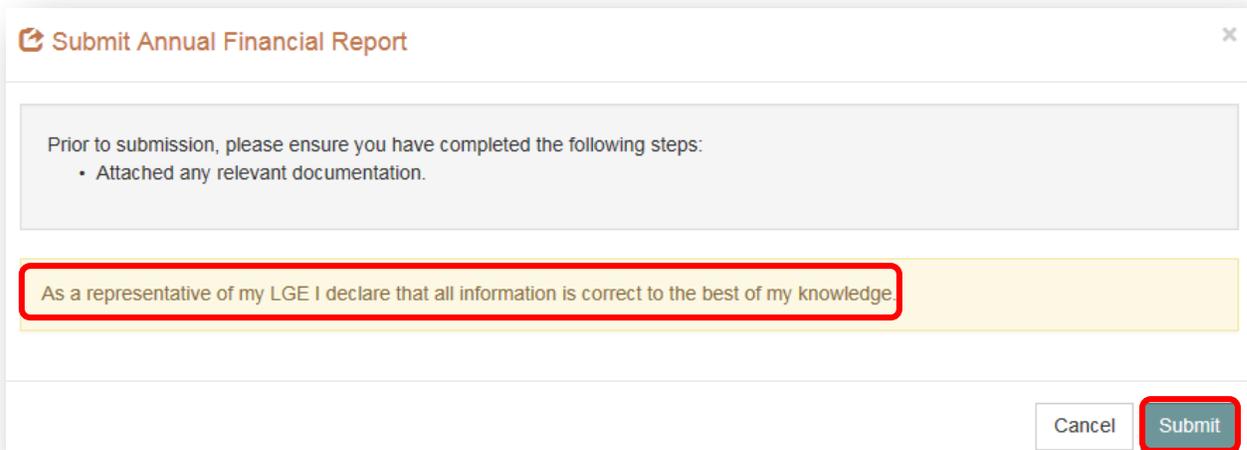
6. Press . (Bottom, right of form.)



7. Press . (Top, right of form.)



8. By pressing “Submit” the second time, you are acknowledging that as a representative of the entity, all information is correct to the best of your knowledge and that you have attached all documents. Note: if you don’t attach all documents before hitting submit you will need to call the LGS and have them reset the Status Reason before you can upload more documents. (See #1, above.) Also, you cannot edit anything you’ve entered or uploaded once you press the final submit button.



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[Annual Financial Report Filing Fee](#)

Please mail your AFR filing fee check to the Local Government Services Bureau. We are not set up to receive on-line payments at this time. See [Appendix 2](#) for filing fee tables.

Local Government Services Bureau
PO Box 200547
Helena, MT 59620-0547

Note: when applicable, the LGS must have your entity's filing fee payment before they can accept your AFR.

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Appendix 1 – Report Forms & Field Definition

See Form field definitions for the following portal forms:

- [Annual Financial Report Form](#)
- [Audit or Financial Reviews Form](#)
- [Budget Report Form](#)
- [Contract Form](#)

Annual Financial Report Form

FY2015: City of Helena

Annual Financial Report Submission

Upon completion of this Annual Financial Report, Please submit it for review using the button at the right.

AFR Details

Fiscal Year	FY2015	Total Revenues	
FYE	6/30/2015	Total Debt Proceeds	
AFR Due	12/31/2015	Total Financial Assistance	
Portal Submitted Date		Audit Required	<input type="radio"/> Yes <input checked="" type="radio"/> No
Entity *	City of Helena		

AFR/DLL Receipt & Acceptance

AFR Rec'd Date		DLL Rec'd	<input type="radio"/> Yes <input checked="" type="radio"/> No
AFR Accepted Date		DLL Acceptance Date	

Documents

↑ /
+ New
↓ Download

↻

Name	Comments	File Size	Last Updated

AFR Details

- Fiscal Year – year of report
- FYE – month & day an LGE’s fiscal year ends
- AFR Due – date the LGE’s AFR is due - or 6 months after their FYE
- Portal Submitted Date – date that an LGE submits their AFR through the LGS Registered User’s Portal
- Entity – name of local government
- Total Revenues – total revenues an LGE has at FYE. Revenues of \$500,000 or more requires that an LGE pay a filing fee and have an audit.
- Total Debt Proceeds –

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Appendix 1 – Report Forms & Field Definitions (continued)

Annual Financial Report Form (continued)

AFR Details (continued)

- Total Financial Assistance – Total Revenues + Total Debt Proceeds. Total Financial Assistance of \$500,000 or more requires an LGE to have an audit.
- Audit Required (yes/no) – acknowledges whether an LGE is required to have an audit or not. This is based on their Revenues or Total Financial Assistance being \$500,000 or more.

AFR/DLL Receipt & Acceptance

- AFR Rec'd Date – date the LGS receives the LGE's AFR. Prior to FY2015 AFR's need to be received as a paper document. Beginning with FY2015 AFR's, LGE's may submit an electronic copy through the LGS Registered User's Portal.
- AFR Accepted Date – date the LGS accepts the AFR. Both the AFR and DLL have to be accepted before delinquent report fees will no longer be assessed.
- DLL Rec'd (yes/no) – acknowledges whether the Database Ledger Load has been received by the LGS
- DLL Acceptance Date – date the LGS accepts the Database Ledger Load. Once the LGS accepts both the AFR and DLL, delinquent report fees will no longer be assessed.

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Appendix 1 – Report Forms & Field Definitions (continued)

Audits and Financial Reviews Form

Public Information

Home / Public Information / Audits and Financial Reviews / Audit & Financial Review

FY2018: East Glacier Park School Dist No. 50

Engagement Type *

Audit/Financial Review Information

Fiscal Year *	<input type="text" value="FY2018"/>	Span	<input type="text" value="1 Year"/>
Period Start	<input type="text" value="7/1/2017"/>	Expected Submission Date	<input type="text" value="6/30/2019"/>
Period End	<input type="text" value="7/1/2018"/>	Statutory Due Date	<input type="text" value="7/1/2019"/>
Rec'd Date	<input type="text"/>	Contracted Fee	<input type="text" value="\$ 4,500.00"/>
Contract *	<input type="text" value="7/2015-6/2018: East Glacier Park School Dist No. 50"/>	Audit Firm	<input type="text" value="Strom & Associates, PC - Billings 738"/>
LGE *	<input type="text" value="East Glacier Park School Dist No. 50"/>	County	<input type="text" value="Glacier"/>
		FYE *	<input type="text" value="06/30"/>

Finding & Response Information

Audit Findings	<input type="radio"/> Yes <input checked="" type="radio"/> No
Response Due	<input type="text"/>
OPI Acceptance	<input type="text"/>
Response Required	<input type="radio"/> Yes <input checked="" type="radio"/> No
Response Rec'd	<input type="text"/>
Final Acceptance	<input type="text"/>

Audit Report Transmittal Information

Actual Hours Involved in Conducting Audit/Financial Review	<input type="text"/>
Total Fee Billed to Entity	<input type="text"/>
Federal Program Audit	<input type="radio"/> Yes <input checked="" type="radio"/> No
Opinion Date of Report	<input type="text"/>
Date Final Report Delivered to Entity	<input type="text"/>

Documents

↑ /
Download
↻

Name	Comments	File Size	Last Updated

- Engagement Type – audit, financial review, voluntary, or combined with

Audit/Financial Review Information

- Fiscal Year – year of audit
- Period Start – beginning of fiscal year
- Period End – end of fiscal year

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Appendix 1 – Report Forms & Field Definitions (continued)

Audits and Financial Reviews Form (continued)

- Rec'd Date – date LGS rec'd audit/financial review
- Contract – contract name includes contracted period and LGE
- LGE – local government entity
- Span – audits can span for one or two years
- Expected Submission Date – date that auditor expects to have the audit to LGS
- Statutory Due Date – 1 year after LGE's fiscal year end
- Contracted Fee – fee the auditor charged the LGE
- Audit Firm – name of audit firm preparing the audit report
- County – where LGE resides
- FYE – fiscal year end

Finding & Response Information

- Audit Findings (yes/no) – acknowledges whether the LGE had any findings in their audit
- Response Due – if findings in the audit, the response is due to the LGS one month after the LGE receives the audit from the auditor
- OPI Acceptance – date that OPI lets LGS know they have accepted a school district's or special education cooperative's audit response
- Response Required (yes/no) – acknowledges whether a response is required for any audit findings an LGE might have in their audit report
- Response Received – date response to audit findings is received by LGS
- Final Acceptance – the date LGS (and OPI for school districts and special education cooperatives) has accepted the response to all findings within an LGE's audit or financial review report and sent the LGE a letter acknowledging their acceptance

Audit Report Transmittal Information

- Actual Hours... - actual hours it took the auditor to perform the audit or financial review and write the report
- Total Fee Billed... - total amount the auditor billed the LGE
- Federal Program Audit (yes/no) – acknowledges whether the LGE received funds from a federal program during the audit year
- Opinion Date of Report – date of audit report or financial review
- Date Final Report Delivered... - date LGS receive the final audit or financial review report from the auditor

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Appendix 1 – Report Forms & Field Definitions (continued)

[Budget Report Form](#)

Home / Public Information / Budgets / Budget

 **FY2016: Beaverhead County**

Budget Information

Budget Details

Due Date	10/1/2015	Rec'd Date	10/26/2015
FY	FY2016		

Values

Total Market Value	\$ 1,098,096,411	Total Taxable Value	\$ 20,210,834
Road Taxable Value (Counties only)	\$ 14,939,147		

Documents

Download Search

Name	Comments	File Size	Last Updated
 BeaverheadCo-2016-BUDGET-010101.pdf		1.9 MB	2015-10-27 11:44 AM

Budget Details

- Due Date – date that the budget document is due
- FY – fiscal year budget document is for
- Rec'd Date – date that LGS received the budget document

Values

- Total Market Value
- Road Taxable Value (Counties only)
- Total Taxable Value

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Appendix 1 – Report Forms & Field Definitions (continued)

Contract Form

 7/2009-6/2011: City of Helena

Contract Information

Period Start *	<input type="text" value="7/1/2009"/>	Period End *	<input type="text" value="6/30/2011"/>
Received Date	<input type="text" value="7/8/2010"/>	Approved Date	<input type="text" value="7/8/2010"/>
Contract Type	<input type="text"/>		

LGE Information

LGE *	<input type="text" value="City of Helena"/>
County	<input type="text" value="Lewis and Clark"/>
FYE *	<input type="text" value="06/30"/>

Audit Firm Information

Audit Firm	<input type="text" value="Anderson ZurMuehlen & Co, PC - Helena 203"/>
City	<input type="text" value="Helena"/>

Audits

+ New Open Delete Refresh

Status Reason	LGE	County - Prima...	FY	FYE	Statutory Due...	Expected Submiss...	Audit Received	Audit
Submitted	City of Helena	Lewis and...	FY2011	06/30	3/30/2012	12/19/2011	12/29/2011	A
Submitted	City of Helena	Lewis and...	FY2010	06/30	3/30/2011	12/19/2010	12/28/2010	A

Loaded 1 - 2 of 2 records

Documents

+ New Download Delete Search Refresh

Name	Comments	File Size	Last Updated

Contract Details

- Period Start – date that contract begins
- Received Date – date that LGS received the contract from the auditor
- Contract Type – audit or financial review
- Period End – date that contract ends. Contract can be for no more than 3 years.
- Approved Date – date that LGS approved the contract

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Appendix 1 – Report Forms & Field Definitions (continued)

Contract Form (continued)

LGE Information

- LGE – local government entity
- County – county where LGE is located
- FYE – fiscal year end of LGE

Audit Firm Information

- Audit Firm – Independent Auditor contracting with LGE
- City – City where the audit firm or auditor is located

Audits

See [Audit & Financial Review Form](#)

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[Appendix 2 – Filing Fee Tables](#)

[Current Filing Fees Table \(effective 6/30/2015\)](#)

Minimum	Maximum	Filing Fee
0.00	500,000.00	0.00
500,000.01	1,000,000.00	550.00
1,000,000.01	1,500,000.00	800.00
1,500,000.01	2,500,000.00	950.00
2,500,000.01	5,000,000.00	1,300.00
5,000,000.01	10,000,000.00	1,700.00
10,000,000.01	50,000,000.00	2,500.00
50,000,000.01	1,000,000,000.00	3,000.00

[Previous Filing Fees Table \(prior to 6/30/2015\)](#)

Minimum	Maximum	Filing Fee
0.00	500,000.00	0.00
500,000.01	1,000,000.00	435.00
1,000,000.01	1,500,000.00	635.00
1,500,000.01	2,500,000.00	760.00
2,500,000.01	5,000,000.00	845.00
5,000,000.01	10,000,000.00	890.00
10,000,000.01	50,000,000.00	965.00
50,000,000.01	1,000,000,000.00	1,000.00

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Appendix 3 – Document Submittal, Naming Conventions, and Viewing Information Table

Document Name	Submit through Portal	Document Format	File Naming Convention	Viewable by Unregistered User	Viewable by Registered User
Additional Documents (e.g. Amended Contracts and Reports or Responses to Findings not submitted with the Audit or Financial Review)	Preferably NO Send through email LGSPortalRegistration@mt.gov or the File Transfer Service https://transfer.mt.gov	See below for applicable document.	See below for applicable document.	See below for applicable document.	See below for applicable document.
Annual Financial Reports	YES	Portable Document Format (.pdf)	LGE-20XX(fiscal year)-AFR	YES (once accepted by LGS)	YES (once accepted by LGS)
Audits or Financial Reviews	YES	Portable Document Format (.pdf)	LGE-20XX(fiscal year)-AUDIT	YES	YES
Audit or FR Response (if submitted separate from the report)	See “Additional Documents”	Portable Document Format (.pdf)	LGE-20XX(fiscal year)-RESPONSE	YES	YES
Budgets	YES	Portable Document Format (.pdf)	LGE-20XX(fiscal year)-BUDGET	YES	YES
Contracts	YES	Portable Document Format (.pdf)	LGE-20XX-XX-CONTRACT (20XX-XX = the contract period. For example: the contract period of 7/1/2015 through 6/30/2017 = 2015-17)	NO	YES (once approved by LGS)

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Document Name	Submit through Portal	Document Format	File Naming Convention	Viewable by Unregistered User	Viewable by Registered User
DLLs (if submitted separate from the AFR)	See “Additional Documents”	Excel (.xls or .xlsx)	LGE- 20XX(fiscal year)-DLL	NO	NO
Filing Fee Form	NO (*see below)	Paper Form	Not Applicable	NO (unless it’s included in AFR)	NO (unless it’s included in AFR)

If no filing fee is owed, you do not have to remit a completed filing fee form.

***If a filing fee is owed, please print the completed filing fee form and mail with your payment to:**

Montana Department of Administration
Local Government Services Bureau
Mitchell Bldg. - Room 270
PO Box 200547
Helena, MT 59620-0547

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