

DATE: September 19, 2022
REPORT NO: T-25-2022
SUBJECT: **MyWESTLINCOLN Financial Portal**
CONTACT: Donna DeFilippis, Director of Finance/Treasurer

OVERVIEW:

- MyWESTLINCOLN is an on-line, self-serve portal that allows customers to access their property tax, water and accounts receivable accounts with the Township at their convenience.
- Through MyWESTLINCOLN, residents can create a secure and confidential online account whereby they can review and manage their property tax, utility, and accounts receivables, make credit card payments toward account balances (a third-party service fee applies), register for paperless billing and notification settings, enroll in pre-authorized payments, and look up property assessment information.
- The completion of this project was made possible through the receipt of a Modernization Grant from the Province of Ontario

RECOMMENDATION:

That, Information Report T-25-2022, regarding the “MyWESTLINCOLN Financial Portal”, dated September 19, 2022, be received for information.

ALIGNMENT TO STRATEGIC PLAN:

Theme #6

- Efficient, Fiscally Responsible Operations - The Township of West Lincoln is a lean organization that uses sustainable, innovative approaches and partnerships to streamline processes, deliver services and manage infrastructure assets

BACKGROUND:

In October of 2021, staff in the Finance department applied for funding through the Province’s Modernization program, towards a project to digitalize processes within the Finance Department. On January 25, 2022, staff received approval of the application, which secured funding of up to \$133,611. One of the projects outlined in the grant application was the set-up and implementation of a citizen portal that would allow the public to access account information through an on-line process. Finance staff included this in the grant application in response from numerous requests from the public for a desire to access account information and invoices electronically. The grant also provided funding towards the following initiatives, with a deadline of February 28, 2023:

- Set-up and implementation of Caseware software to digitalize portions of the Financial Statement and Financial Information Return (FIR) preparation
- Modernization of Water meter reading software
- Modernization of Bulk water meter system and software
- Continued improvements to budgeting software and reporting

The completion of the citizen portal portion of this project is a significant milestone. Some of the benefits of having a citizen portal include the following:

- Customers can access account information at times that are convenient to them, not just during Township operating hours
- The ability to receive Township invoices via email. This has been an item that customers have been requesting for the past few years, even prior to the COVID 19 pandemic
- Credit Card payment processing is more streamlined and efficient for the public and staff
- Savings to the Township as a result in a reduction of paper and postage costs

CURRENT SITUATION:

The citizen portal has been branded as MyWESTLINCOLN and is accessed through a link on the Township's website. It is a tool that will allow customers to view their account information, including invoices, on-line at times that are convenient to them. Customers are able to access their water, property tax and accounts receivable accounts. MyWESTLINCOLN is linked to the Township's Financial Software system in real-time, providing up to date information to customers. The portal also provides an easy and safe method to make credit card payments on these accounts.

The final product had an official launch on August 24, 2022, and to date the Township has had 59 customers sign up in less than one month from launching. Once funding was approved, staff had a very short time frame to ensure successful completion. The project commenced in March 2022 and was completed in five months. The items below are a summary of the various steps and milestones that had to be accomplished:

- Continuous review of customer IDs to ensure accuracy. This commenced prior to grant approval. Staff knew that a citizen portal was something that the public wanted. Tasks such as this that were required and did not incur additional costs were implemented with the plan to someday launch a citizen portal.
- Establish a project team and timeline both internally and with the vendor. The Manager of IT, Manager of Finance/Deputy Treasurer and the Director of Finance/Treasurer represented the Township on the project team.
- Design the portal: this involved both the look of the portal and the contents that would be available to the customer. This involved countless meetings with both the vendor and internal staff. In addition, staff spent considerable time reviewing other similar type municipal finance portals for ideas and best practices. All staff in the department were involved in this stage of the project providing crucial feedback

- A separate project was initiated with our Credit Card provider to ensure that the payment gateway would be properly transitioned and integrated into MyWESTLINCOLN. This portion of the project involved its own set of documentation and testing.
- Ensure that the portal was network “safe” and met all requirements of third party formal penetration testing and security posture.
- Included in the grant application was funding for two student positions to assist with tasks. The Manager of Finance and Director of Finance developed a job description, interviewed and successfully hired one student to work the summer term and another student to work the fall term. This project would not have been completed in a timely manner without the additional resources offered by the student. This was a wonderful opportunity for the department to receive essential assistance as well as for the student to gain valuable experience.
- Once a draft portal was available the testing of the site commenced. This was a critical piece of the project as staff needed to ensure that customers would not be faced with challenges when accessing the site. All aspects of the site were tested and documented.
- Issues revealed during testing were forwarded to the vendor for discussion and resolution.
- Training material was developed for internal use so that Finance staff understood all of the functionality of the site. It was important for staff to have training in two different aspects - customer support and integration with the financial system. All training documentation was developed in house by Finance department staff.
- New content was developed for the Township website to both promote MyWESTLINCOLN and to also assist the public with setting up their account. The Township website easily highlights the appropriate link on the front page. Once there the public can access all pertinent information, including the answers to commonly asked questions. All information on the website was designed and developed by Finance department staff. Attached as **Appendix A** to this report is a summary of the website content that was developed and is now posted on the Township website.
- Staff met with the Communications Specialist to discuss the branding of MyWESTLINCOLN and the social media promotion of the portal. Staff have ensured that all communication is consistent, concise and appealing.
- Promotional products have been created and distributed to all Library branches as well as the West Lincoln Community Centre
- The Finance department continue to promote the portal both in person with customers and over the phone.

MyWESTLINCOLN is a response to customer requests to have the ability to access accounts on-line. In particular, customers have been requesting the ability to receive invoices electronically. Staff have also been able to deliver on the item below that is listed as a short-term initiative in the Township’s Corporate Strategic Plan:

“Implement new software and programs to modernize service delivery, such as online registration and payment, asset management, maintenance activities, online mapping, by-law issues and water and wastewater administration”

FINANCIAL IMPLICATIONS:

The Finance Digital Modernization Project has a budget of \$202,000. The MyWESTLINCOLN portion of the project has a cost of \$28,000 to date, including the cost of the summer student.

INTER-DEPARTMENTAL COMMENTS:

This report was reviewed by the CAO.

CONCLUSION:

The MyWESTLINCOLN portal provides the Township with an on-line service delivery tool that meets the needs of many of our customers.

Prepared & Submitted by:



Donna DeFilippis,
Director of Finance/Treasurer

Approved by:



Bev Hendry,
CAO