



INSTRUCTIONS ON COMPLETING AND SUBMITTING THE ANNUAL FINANCIAL INFORMATION REPORT (AFIR)

AFIR Process: Overview

Municipalities and counties provide fiscal data via the Annual Financial Information Report (AFIR) that is used at both the federal and state level to provide various user groups information on funding and functions of local governments in North Carolina. AFIRs may be used by legislative researchers, advocacy organizations, and government agencies including the N.C. Department of Revenue and the U.S. Census Bureau. AFIRs are also available to the public.

Units of local government provide AFIR data based on the revenue and expenditure/expense information included in annual audit reports. The information is submitted to the US Census Bureau via an Excel template available on the US Census Bureau website. This Excel template is also available at the NC Department of State Treasurer website. Although the Excel templates are available on both the US Census Bureau website and the NC Department of State Treasurer website, completed forms must be uploaded via the Census Bureau website only.

Annual submission of the AFIR is due by October 31 and is required by NC General Statute 159-33.1.

For issues regarding access to the US Census Bureau website, including help logging into the system, requests to change unit email address, or password assistance, please contact Census Bureau support staff at ewd.local.finance@census.gov or call 301-763-5153 or 1-800-242-4523. For questions regarding the content of the AFIR, please contact Department of State Treasurer staff at 919-814-4299 or AFIR@nctreasurer.com.

Instructions, templates, and other important information on the AFIR can be found on the North Carolina Department of State Treasurer website at

<https://www.nctreasurer.com/divisions/state-and-local-government-finance-division/lgc/local-fiscal-management/afir>.



NORTH CAROLINA
DEPARTMENT OF STATE TREASURER

STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

STATE AND LOCAL GOVERNMENT FINANCE DIVISION
AND THE LOCAL GOVERNMENT COMMISSION

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The U.S. Census' website URL address is: <https://statecollection.census.gov/SDCHome.aspx>

Select "North Carolina" from the drop-down menu.

State Data Collections

****U.S. Census Bureau Notice and Consent Warning ****

You are accessing a United States government computer system. This United States government computer system is provided for the collection of financial data of the local government units in this state. Use of this system indicates your consent to collection, monitoring, recording, and use of the information you provide for any lawful government purpose. So that our network remains safe and available for its intended use, network traffic is monitored to identify unauthorized attempts to access, upload, change information, or otherwise cause damage to the web service. Use of a government computer network for unauthorized purposes is a violation of federal law and punishable by fines or imprisonment (Public Law 99-474).

January 8, 2020

****WARNING**WARNING**WARNING**WARNING**WARNING****

Please select your state to start :

Go

If you need help logging into the system please email the support staff at ewd.local.finance@census.gov or call 301-763-5153 or 1-800-242-4523.



Logging in to the “North Carolina State Treasurer’s” data collection website

North Carolina State Treasurer Annual Financial Information Report (AFIR)

Collection of 2023 Fiscal Year Data

Municipalities and Counties provide fiscal data that is used at both the Federal and State level to provide various user groups information on funding and functions of local governments in North Carolina. This information is not audited, but self-reported by local governments and should agree with their annual audit but summarized differently. U.S. Census and the North Carolina State Treasurer have collaborated to make this web-based form available for North Carolina Municipal and County Governments. Each county and municipality is assigned a discrete username. If you do not have access to your username please call 919-814-4299.

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January 8, 2020

****WARNING**WARNING**WARNING**WARNING**WARNING****



Please enter your User ID and Password in the login fields and acknowledge the Notice and Consent Warning to gain access to your form. To submit a prior year's AFIR, please email tiffany.anderson@nctreasurer.com with the request.

[State User Instructions](#)

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Login

- Login by entering the appropriate information and press the "Login" button
- UserID and Password are case sensitive

UserID:

Password:

☐ I have read, understood, and agreed to the U.S. Census Bureau Notice and Consent Warning

☐ Change Password After Login

[Forgot Password](#)

[Login Help](#) If you need help logging into the system please email the support staff at ewd.local.finance@census.gov or call 301-763-5153 or 1-800-242-4523.

To change unit email address, please send request to ewd.local.finance@census.gov

If you have any questions regarding the content of the AFIR, please call the Fiscal Management Section of the NC State Treasurer at 919-814-4299. Please note that training materials can be found on the NC Treasurer's web site at <https://www.nctreasurer.com>



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Frequent issues related to logging in:

Note: Each unit is assigned a unique user ID, and that user ID is associated with a single email address that is on file with the Census Bureau.

Issue: You've forgotten your password or your password has expired.

Solution: Click on the "Forgot your Password?" link on the main screen. From there, you may enter your user ID and the email address on file with the Census Bureau for your unit.

State Data Collections

State Data Collections

User ID:
Email:

If the email address entered does not match the email address on file with the Census Bureau for your unit, you will receive an error message and the password cannot be reset. If the email address entered is the email address on file with the Census Bureau for your unit, a link to reset the password will be emailed. Contact the Census Bureau if the email address for the unit needs to be updated.

Issue: You request a password reset but do not receive an email with instructions.

Solution: Check your spam to be sure the message wasn't diverted. If you still have no email, contact the Census Bureau for assistance.

Only the Census Bureau can assign or reset passwords, user IDs, and email addresses for a unit. For assistance, please contact the U.S. Census Bureau support staff at 1-800-242-4523 or ewd.local.finance@census.gov. Although the NC Department of State Treasurer staff may be contacted at 919-814-4299 or AFIR@nctreasurer.com for general support or if you are unable to receive timely assistance, we cannot assign or update passwords, user IDs, or email addresses.



Downloading the AFIR Template

Log OutHome

North Carolina State Treasurer

Annual Financial Information Report (AFIR)

Welcome nctcity!
Thursday, August 5, 2021

NC State Treasurer AFIR File Upload

STEP 1:

Please select the survey Excel template below. On the Verification Tab within the template, please select your unit's name. IMPORTANT - Save the file to your local hard drive, then complete the form and re-save.

Select Survey: [2021 City Template](#) (City/Town/Village)

STEP 2:

Use the Browse button to select the file from your local hard drive. When you press the Upload File button, your browser will transmit the file to our web server.

Enter Filename:

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Once logged in, proceed to Step 1 and click on "20XX City Template" to download the Excel template. Note that both counties AND municipalities use the same template. The template is also available on the DST website. The template is not an online form; it must be downloaded, completed, and saved on your local computer.

Completing the Form

The form should open to the "Verification" tab. Click in the yellow box in lines 4-5 and use the drop-down arrow to select your unit's name. If it is not on the list, please contact DST staff at 919-814-4299 or AFIR@nctreasurer.com.

Complete the following worksheets, as applicable. Please do not delete any worksheets in the template even if the requested information is not applicable to your unit as doing so impacts processing of the form.

Verification

Governmental Fund Revenue

Governmental Fund Expenditures

Proprietary Fund Revenue

Proprietary Fund Expenditures

Miscellaneous

Water and Sewer (if applicable)

White Goods (counties only)

School Capital Outlay (counties only)



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Inspections

Three worksheets provide detailed instructions on completing the template:

Instructions

Line Item Instructions – Gov

Line Item Instructions – Proprietary

Please note:

- Numbers should be entered on the same accounting basis as in your audited financial statements: modified accrual for governmental and accrual for proprietary funds.
- Report the numbers on your “Revenue, Expenditure and Change in Fund Balance Statement” or your “Revenue, Expense and Change in Fund Net Position Statement.”

Once all data has been entered, return to the “Verification” worksheet to resolve any errors and complete the verification section.

- **Resolve Errors:** The following errors will cause messages to be displayed on the “Verification” worksheet. Any errors must be resolved prior to uploading the form to the Census Bureau.
 - Discrepancy of more than \$100 on the “Proprietary Exp” worksheet between the Change in Net Position entered from the audited financial statements and the Change in Net Position calculated in the worksheet
 - Discrepancy of more than \$100 on the “Gov. Exp” worksheet between the Change in Fund Balance entered from the audited financial statements and the Change in Fund Balance calculated in the worksheet
 - Incomplete salary information on the “Miscellaneous” worksheet (row 20, item #30130)
 - Counties only: Discrepancy of more than \$100 between the school capital outlay (excluding debt service) entered in the “Gov. Exp” worksheet (row 51, item #15382) and the school capital outlay calculated on the “School Capital Outlay” worksheet (row 53)
- **Complete the Verification Section:** Complete the mandatory verification section including the name and contact information of the person submitting the AFIR. The template cannot be uploaded if this data is missing.



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Uploading the AFIR

- Return or log into the U.S. Census Bureau website and proceed to Step 2. Use the “Browse” button to select the file, then click “Upload” to upload it to the website.

STEP 2:

Use the Browse button to select the file from your local hard drive. When you press the Upload File button, your browser will transmit the file to our web server.

Completed ! Thank you for uploading your file. If you have any questions, the contact information is in login page.

Enter Filename: Browse...

Upload File

- Document being uploaded can only be .xls or .xlsx format. Please use original template.

Please select the survey Excel template below. On the Verification Tab within the template, please select your unit's name. IMPORTANT - Save t

Select Survey: 2021 City Template (City/Town/Village)

Use the Browse button to select the file from your local hard

Enter Filename: Desktop\NC_cityForm_2021. Browse...

Only .xls or .xlsx formats are allowed

Upload File

Message from webpage

Upload Excel xls or xlsx file only

OK

- To resubmit an AFIR for the current year please contact DST staff at 919-814-4299 or AFIR@nctreasurer.com. The file cannot be reuploaded to the Census Bureau website until it is unlocked. You will see the error below if you try to resubmit.

Lockout User



The form has already been submitted. Please contact the Fiscal Management Section Of the NC State Treasurer at (919) 814-4299.

- To submit an AFIR for a previous year, please contact DST staff at 919-814-4299 or AFIR@nctreasurer.com.



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Summary

US Census Bureau AFIR Website

<https://statecollection.census.gov/SDCHome.aspx>

NC Department of State Treasurer AFIR Website

<https://www.nctreasurer.com/divisions/state-and-local-government-finance-division/lgc/local-fiscal-management/afir>

For assistance with access to the US Census Bureau website, including user ids and passwords, contact
US Census Bureau

ewd.local.finance@census.gov

301-763-5153 or 1-800-242-4523

For assistance with AFIR content and template completion, contact:

Department of State Treasurer

AFIR@Nctreasurer.com

919-814-4299