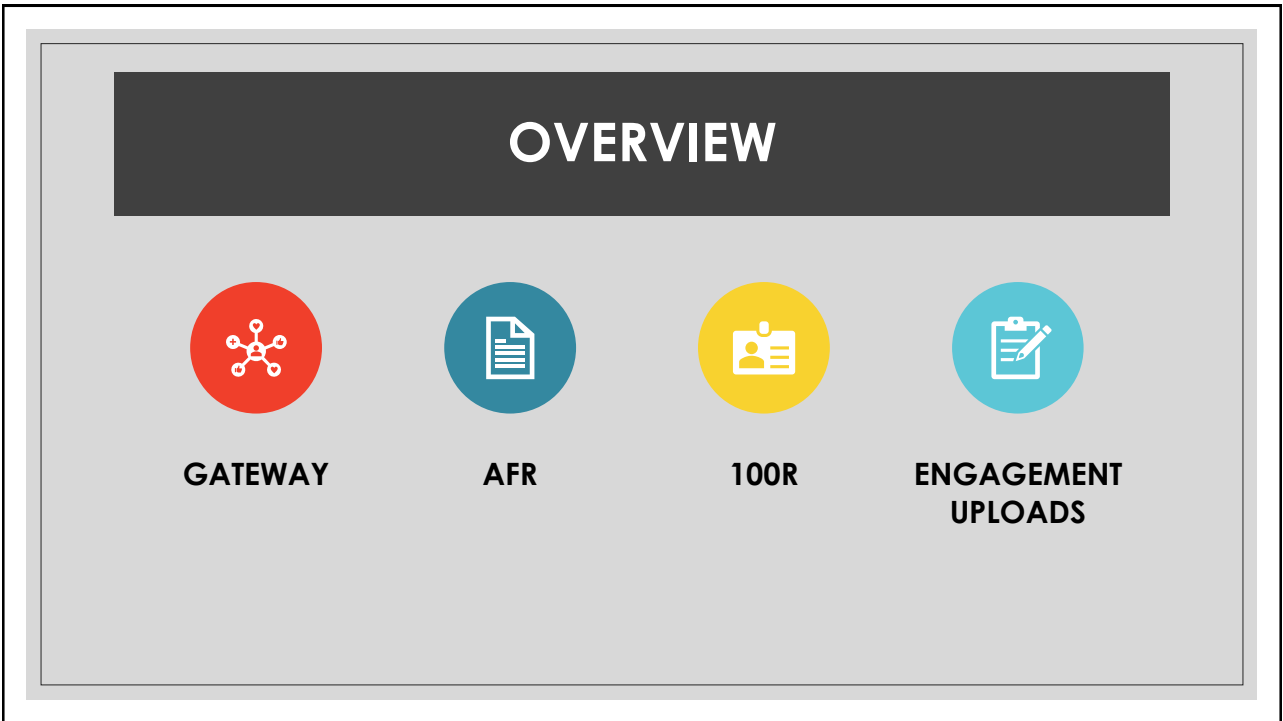




1



2



3

The Gateway portal is a collaborative effort between many state agencies and IBRC, the Indiana Business Research Center at IU.

Officials at local government units are required to upload financial information for use by various agencies including by SBOA, DLGF, DOE, BMV, and the Indiana Gaming Commission

A horizontal row of nine solid red circles is positioned at the bottom of the text area.

4

The SBOA has 6 applications on Gateway:

- **AFR-Annual Federal Report**
- **100R-Employee Compensation**
- E-1-Entity annual report
- ECA-Extracurricular accounts
- Conflict of Interest Disclosure
- **Monthly and Annual Engagement Uploads**



5

- Access through internet browser:
Google Chrome or **Firefox** are supported browsers
- Login: <https://gateway.ifionline.org/login.aspx>
- Username: **email address**
- To set up a user email the Helpdesk:
Gateway@sboa.in.gov
- Can reset password yourself. But locked out after 5 bad attempts and must email Helpdesk at that point



6

- Userguides (search with "CTRL+F"):
<https://gateway.ifionline.org/help.aspx>
- Submitter must submit the AFR/100R but can authorize an editor to assist. Complete Limited Delegation of Authority form and email to Helpdesk. Form found at:
<http://www.in.gov/sboa/files/DelegationForm.pdf>



7

**100R**

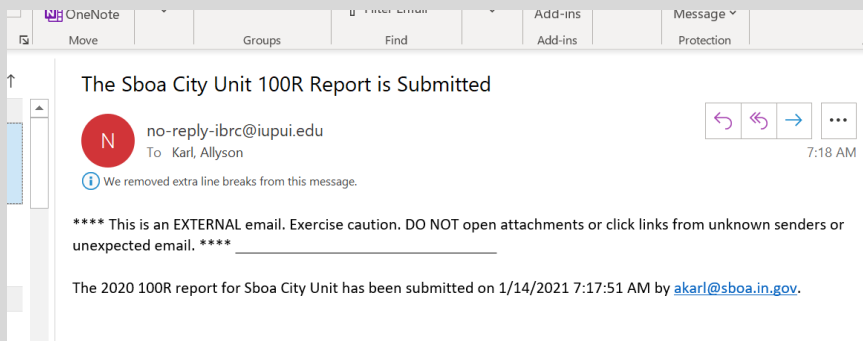
8

- Due Date: **January 31, 2021**
- You will report total compensation on the 100R for all employees who receive a W-2 including directors
- You can enter employee information manually or through a direct upload.
- Data publicly available online



9

Submission email:



10

Sample CSV Upload File:



CORRECT

1	Year	Last	First	Middle	Dept	Street	City	State	Zip	Title	Comp
2	2020	Caldwell	Alexander	B		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	100.00
3	2020	Caldwell	Amy	G		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	200.00
4	2020	Caldwell	Anna	F		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	300.00
5	2020	Caldwell	Anthony	B		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	400.00
6	2020	Caldwell	Ashley	A		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	500.00
7	2020	Caldwell	Autumn	A		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	600.00
8	2020	Caldwell	Brenda	D		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	700.00
9	2020	Caldwell	Bruce	E		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	800.00

INCORRECT

1	A	B	C	D	E	F	G	H	I	J	K
1	Year	Last	First	Middle	Dept	Street	City	State	Zip	Title	Comp
2	2020	Caldwell	Alexander	B		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	100
3	2020	Caldwell	Amy	G		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	200
4	2020	Caldwell	Anna	F		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	300
5	2020	Caldwell	Anthony	B		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	400
6	2020	Caldwell	Ashley	A		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	500
7	2020	Caldwell	Autumn	A		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	600
8	2020	Caldwell	Brenda	D		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	700
9	2020	Caldwell	Bruce	E		302 W. Washington Street	Indianapolis	IN	46204	Field Examiner	800



11



AFR

12


- Due Date: **March 1, 2021**
- Provide information for financial statements
- Most data publicly available online





13

Submission email:

The Sboa Township Unit Annual Report is Submitted

 no-reply-ibrc@iupui.edu
To: Karl, Allyson; mdhollin

 7:57 AM

 We removed extra line breaks from this message.

**** This is an EXTERNAL email. Exercise caution. DO NOT open attachments or click links from unknown senders or unexpected email. ****



The 2020 annual report for Sboa Township Unit has been submitted on 1/19/2021 7:57:22 AM by akarl@sboa.in.gov.



14

Only submitter can un-submit:

Upload Public Official Surety Bonds	Per IC 5-4-1-5.1(e) upload a copy of bonds filed.	2 Uploaded
System Functions		Status
Upload Files	Uploading is an option for those government units with vendors and who choose to populate a portion of their report by uploading files.	Uploaded
Annual Report Outputs	Reports may be viewed as PDFs or Excel spreadsheets.	Available
Financial Statement/SEFA	Download Financial Statements and SEFA in Excel.	Available
Review Submission	Review any submission errors or warnings.	Available
Un-Submit Annual Report	Un-submit the annual report to SBOA.	Submitted by akarl@sboa.in.gov on 1/19/2021 7:57:00 AM



15



ENGAGEMENT UPLOADS

16

Changes effective December 2020:

Monthly Uploads:

- Bank Reconcilements, **Bank Statements**, and **Outstanding Check Lists**
- Approved Board Minutes
- Funds Ledger- summarizing total receipts, disbursements, beginning balances and ending balances by fund



17

Annual Uploads:

- Year-end Investment Statements
- Detail of Receipts for the year
- Detail of Disbursements for the year
- Current year Salary Ordinance and **Amendments**
- Annual Vendor History Report



18

New Annual Uploads:

- **Annual Payroll History Report, without SS#**
- **Annual Funds Ledger**
- **For Cities/Towns with courts: Court Trust Fund Subsidiary Detail as of December 31**
- **Optional: Excel Data Capture/Data Dump (in lieu of Detail of Receipts and Disbursements)**



19

Direct request email:

State Board of Accounts Engagement Upload Request



no-reply-gateway@sboa.in.gov

To: Karl, Allyson; Bethany Holliday; Kelley, Beth; bj4@iupui.edu; Spurlock, Billy; Kleyn, Catherine; Gibson, Debra; Anderson, Dawn R.; Rogers, Lori; mdhollin; Blough, Robert A (Andy); Hofner, Ricci; rmjustis@indiana.edu; +4 others

Thu 1/14/2021 8:04 AM

**** This is an EXTERNAL email. Exercise caution. DO NOT open attachments or click links from unknown senders or unexpected email. ****

The State Board of Accounts requests that you upload a file to Gateway for sboa county unit in SBOA County. Please email your audit team after you upload the file to inform them that you have provided the requested information.

Requested File: Test direct request - ak
Request Detail: please disregard. thanks for your patience

Please login to the Gateway here <https://gateway.ifionline.org/login.aspx>.

- Select Monthly and Annual Engagement Uploads.
- Select your unit name.
- Select the year.
- Select "Direct Request" from the Upload Group dropdown box.
- Select the file requested in the File Type dropdown box.
- Click the Browse button to find the file on your computer to upload.
- Click the Submit this Upload button to upload the file.

For more detailed instructions with screenshots, please see the user guide.

We appreciate the opportunity to work with you as we continue to advance the tools available to us to keep our audits progressing. Please upload the requested information within seven days of the date of this request. If the requested information cannot be provided within the requested timeframe please contact the audit team.

If you have any questions, email the help desk at gateway@sboa.in.gov.

Thanks,
 SBoA Engagement Strategies



20

