GATEWAY 2023 CITIES AND TOWNS UPDATE Allyson Karl

AGENDA

Introduction

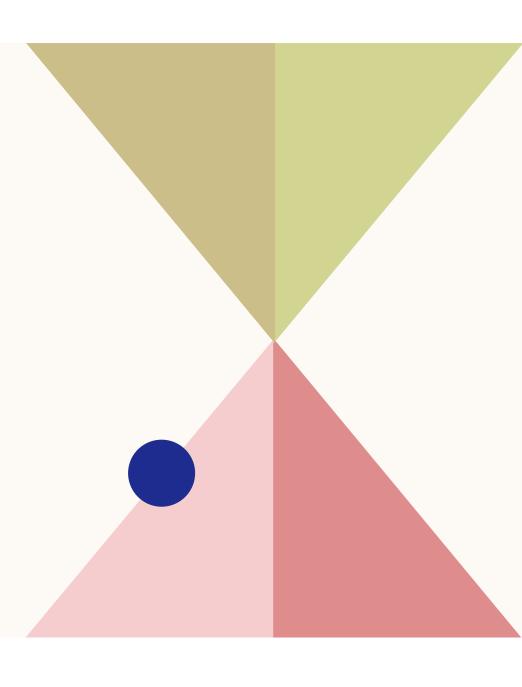
AFR Update

100R Update

Engagement Upload Update

Miscellaneous

Questions and Answers



- Risk Assessment Schedule Eliminated
- Two items moved to unit questions Yes/No:

Does the city or town have one or more credit and/or debit cards issued in the name of the city or town?

Are electronic fund transfers (EFT) permitted for cash?

 Required to complete Capital Assets, Debt and Leases even if unit question answered "No"

- Rollover prior year info to Schedule of Officials
- DUNS number replaced with UEI:

The Unique Entity ID (UEI, previously DUNS) is a unique 12-character identification number that is assigned to entities when they request a Unique Entity Identifier or register on SAM.gov.

987654321098

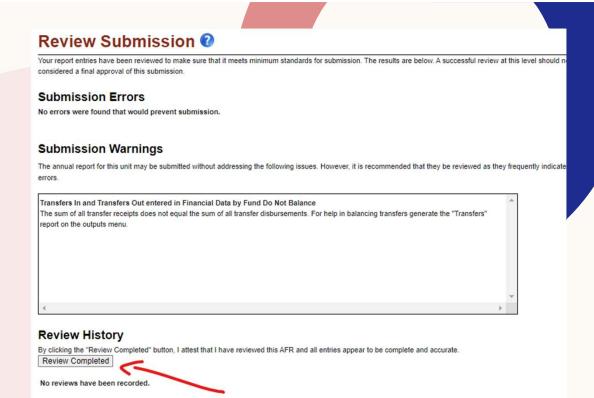
The Federal government requires that all applicants for Federal grants and cooperative agreements have a UEI number. To verify that you have a UEI number go to: https://sam.gov/content/duns-uei The Federal Service Desk has provided instructions as to how to obtain your UEI which you can access using the link below: https://www.fsd.gov/gsafsd-sp?id=kb-article-view&sysparm-article=KB0041254&sys-kb-id=875189f21bee8d54937fa64ce54bcbaa&spa=1

- New fund: 102260 Municipal Health Fund
- Receipt Codes eliminated:

	Taxes=100	
receipt_c	Intergovernmental=300	receipt_account_title
R102	Taxes and Intergovernmental	County Adjusted Gross Income Tax (CAGIT) Certified Shares
R103	Taxes and Intergovernmental	County Economic Development Income Tax (CEDIT)
R104	Taxes and Intergovernmental	County Option Income Tax (COIT)
R124	Taxes and Intergovernmental	Local Option Income Tax (LOIT) for Public Safety
R125	Taxes and Intergovernmental	County Adjusted Gross Income Tax (CAGIT) Additional Distributions
R126	Taxes and Intergovernmental	County Option Income Tax (COIT) Additional Distributions
R127	Taxes and Intergovernmental	County Economic Development Income Tax (CEDIT) Additional Distributions

 Ability to document 2nd party review (Optional)

After the AFR is submitted by user with Edit or Read Only rights



System Functions		Status
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. Document AFR 2nd party review.	Last Reviewed by ckleyn@sboa.in.gov on 6/15/2023 12:45:32 PM
Un-Submit Annual Report	Un-submit the annual report to SBOA.	Submitted by akarl@sboa.in.gov on 9/5/2023 2:14:00 PM

County. Spoatest County

2022-2023

Sboa School Test Unit 1

Only the Submitter can Un-Submit and Resubmit the AFR to make changes.

Users with Edit or Read Only Access will not see the Un-Submit option.

AFR SIDE NOTE

System Functions	•	Status
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. Document AFR 2nd party review.	Last Reviewed by ckleyn@sboa.in.gov on 6/15/2023 12:45:32 PM
<u>Un-Submit Annual Report</u>	Un-submit the annual report to SBOA.	Submitted by akarl@sboa.in.gov on 9/5/2023 2:14:00 PM

Submit Annual Report

The Annual Report has been submitted.

The online portion of the Annual Report for Sboa School Test Unit 1 was submitted to the State Board of Accounts on 9/5/2023 2:14:00 PM.

Return to the AFR Main Menu

By pressing the unsubmit button below, you will be marking this report as not being submitted. If the unit does not resubmit this annual report by the deadline, it will not be in compliance with SBOA reporting requirements.

Unsubmit This Report

100R UPDATE

Upload Personnel Policy-

An additional upload that will be the same as the existing Nepotism and Contracting Policy Uploads. Will carry over year to year unless there is a change to re-upload

	that are required to complete your report. Some of these sections are based on the answers that you gave to the of the answers to those questions, click on the Unit Questions option on the menu.	e questions on the
		Status
Unit Questions	The answers to these questions help tailor the form and validation to your unit.	Complete
Employee Data Entry	Entry is locked for this unit.	249 Rows Entered
Upload File (optional)	Use the Upload tool to transfer your file, which must be appropriately formatted per the Upload Specifications for 100R.	Uploaded
Nepotism Policy Upload	It was indicated that the unit has a nepotism policy. If a policy was uploaded in a previous year, and that policy is current, no further action is needed. Use this application to upload a copy of the file containing that policy if necessary.	Uploaded for 2020 on Jan 20 2021 7:09Al
Contracting Policy Upload	It was indicated that the unit has a contracting policy. If a policy was uploaded in a previous year, and that policy is current, no further action is needed. Use this application to upload a copy of the file containing that policy if necessary.	Uploaded for 2022 on Nov 1 2022 11:41A
100R Report Outputs	Once you have entered or uploaded your information, you can use this option to view your entries, print them, or download them into an Excel file.	Available
Submit 100R	This process includes validation to ensure the information has been entered properly and that the number of records matches the number of employees you indicated in the Questions section. Once any errors have been corrected, you will see the Proceed to Submit button appear and you will click on that to complete the submission.	Submitted by jeabucha@iupui.edu on Jan 25 2023 4:13Pl



CHANGES EFFECTIVE DECEMBER 2023 UPLOADS

New Annual Uploads

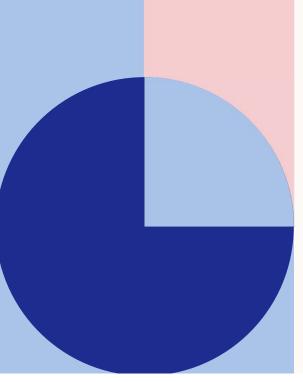
- Accounts Payable/Receivable Schedule Support
- Direct Federal Grant Agreements/Award Letters and Amendments initiated during year
- Agreements for Subawards made to Subrecipients for all Federal Grants initiated during year
- Capital Assets Ledger, General Form 369 (GAAP and ACFR only)
- Contracts for Mowing and Fire Protection (Township only)

Adjustments to Annual Uploads

- Excel Data Capture (Data Dump) is no longer optional but exceptions apply
- Detail of Receipts by fund and account (if Data Capture not available)
- Detail of Disbursements by fund and account (if Data Capture not available)
- Year End Investment Statements and Register of Investments, General Form 350

Adjustments to Monthly Uploads

 Bank Reconcilements, Bank Statements, Outstanding Check Lists change for ECA Accounts



DIRECT REQUEST LETTER TO UNIT

State Board of Accounts Engagement Upload Request



no-reply-gateway@sboa.in.gov on behalf of no-rep



To Johnson, Terry; Byrns, Staci; Hofherr, Ricci; Kelley, Beth; Kleyn, Catherine; Hotchkiss, Brittany Lynn; Rogers, Lori; mdhollin@iupui.edu; rogersc@iupui.edu; +3 others

4:18 PM

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: Documents for Audit

Request Detail: Bank Statement Mowing Contract Personnel Policy

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

NEW FISCAL OFFICER

There are two ways to obtain login credentials:

- Email: <u>Gateway@sboa.in.gov</u> with name, office, entity, effective date
- Request from Gateway login: https://gateway.ifionline.org/login.aspx

Gateway - A User's Perspective

LIMITED DELEGATION OF AUTHORITY

If the fiscal officer (submitter) wishes to grant editor or read-only access to any SBOA application, they can request it in the same way. They will be sent this link to the Limited Delegation of Authority and need to complete, have signed by submitter and email to Helpdesk.

General

https://www.in.gov/sboa/files/ DelegationForm.pdf

1	FOR ENTERING AND		OF AUTHORITY THE INDIANA GATEW COUNTS APPLICATIO	
	L	LIMITED DELEG	ATION OF AUTHORIT	Y
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Name of Delegate (p.	erson receiving rights):			
Email address of the	Delogate (person rece	reing rights):		
Name of Unit and Co	unte			
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IN WITNESS WHER	COF. I have hereunto s	set my hand this	day of	20
Signature of Respons	sible Official	Printed	Name and Title of Res	ponsible Official
	II.	ACKNOWLEDG	MENT BY DELEGATE	
I, the Delogate in the	above and foregoing, h	creby acknowledge	and accept the terms of	the Limited Delegation of Autho
	0	Printed	Name and Title of Del	egate
Signature of Delegate			entreport and, SSGA will pro	ovide the unit's delegate with a union on other responsibility or liability in come or for the accuracy, completeness, times

CountyDept

https://gateway.ifionline.org/forms/DelegationFormUpload ASU.pdf

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	L	LIMITED DELEG	ATION OF AUTHOR	ITY
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Name of Delegate (p	verson receiving rights):			Title:
Email address of the	Delegate (person recei	iving rights):		
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Type of Request	New User (I Remove Us Change Use	Does not have a Gat er (No longer at the er Access	eway ID) unit. All Gateway ac	cess should be removed)
Note: You	cannot delegate subm	it rights.		
Monthly and Annua	al Engagement Upload	is Access (select o	ne): Edit: Re	ad Only: None:
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https://www.in.gov/sboa/files/ DelegationFormECA.pdf

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Name of Extra-Curr	scular Account			
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BEST ADVICE

Read and Search User Guide

https://gateway.ifionline.org/ help.aspx Email Helpdesk:
Gateway
@sboa.in.gov

QUESTION AND ANSWER

THANK YOU