



Visit the Gateway at <https://gateway.ifionline.org/login.aspx>

Gateway User Guide

Form 1

Budget Estimate

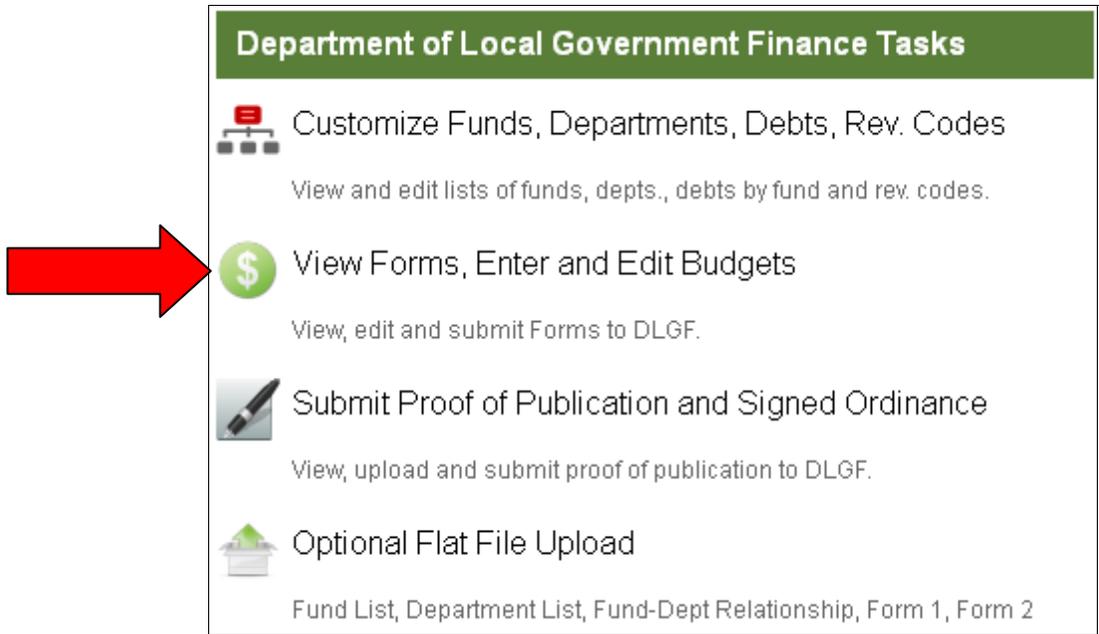


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Accessing Form 1

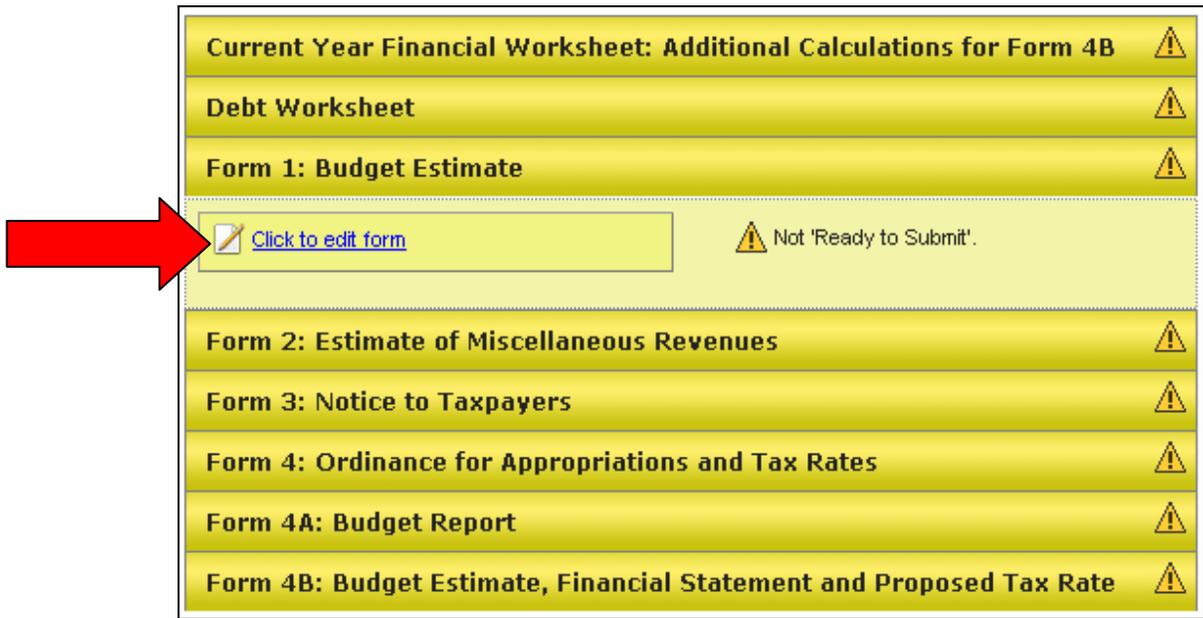
First, navigate to the “Unit Main Menu “by selecting your unit and then clicking “View Forms, Enter and Edit Budgets.”



Department of Local Government Finance Tasks

-  **Customize Funds, Departments, Debts, Rev. Codes**
View and edit lists of funds, depts., debts by fund and rev. codes.
-  **View Forms, Enter and Edit Budgets**
View, edit and submit Forms to DLGF.
-  **Submit Proof of Publication and Signed Ordinance**
View, upload and submit proof of publication to DLGF.
-  **Optional Flat File Upload**
Fund List, Department List, Fund-Dept Relationship, Form 1, Form 2

From the Accordion, select “Form 1: Budget Estimate” and notice the accordion menu expand beneath Form 1. Then click on the link on the left side of the Form 1 box that says “Click to edit form.”



Current Year Financial Worksheet: Additional Calculations for Form 4B	
Debt Worksheet	
Form 1: Budget Estimate	
 Click to edit form  Not 'Ready to Submit'.	
Form 2: Estimate of Miscellaneous Revenues	
Form 3: Notice to Taxpayers	
Form 4: Ordinance for Appropriations and Tax Rates	
Form 4A: Budget Report	
Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate	

Form 1 will now navigate through a drop down menu that will allow users to select a fund and department. Please note that school units will use the Department field in place of their Program Accounts. As you see below, the form currently displays “No Department.” This is the default for users that are not departmentalized or that have not yet created and linked a department to the selected fund.

BUDGET ESTIMATE FOR

Select Fund:

Select Department:



If you have previously completed a Budget in Gateway you should notice the funds, departments and line items carry over from the previous year.

Select Fund:

Select Department:

Select Category Tab

	Personal Services	Supplies	Services And Charges	Capital Outlays	
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Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount
✗	Salaries and Wages	51101	Regular	\$ <input type="text"/>		\$ <input type="text"/>
✗	Salaries and Wages	511011	Longevity	\$ <input type="text"/>		\$ <input type="text"/>
✗	Employee Benefits	51201	PERF - Regular	\$ <input type="text"/>	COPY →	\$ <input type="text"/>
✗	Employee Benefits	51220	FICA	\$ <input type="text"/>		\$ <input type="text"/>
✗	Employee Benefits	51221	Medicare Tax	\$ <input type="text"/>		\$ <input type="text"/>
✗	Employee Benefits	51295	Insurance	\$ <input type="text"/>		\$ <input type="text"/>
+ ADD	Salaries And Wages	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>		
TOTALS BY CATEGORY				Total: \$ 0		Total: \$ 0
TOTALS BY FUND				Total: \$ 0		Total: \$ 0
TOTALS BY UNIT				Total: \$ 0		Total: \$ 0

Ensuring Proper Number of Forms is Available

The availability of Form 1's are based upon the unit customization of fund and department combinations. To ensure that the proper number and type of forms are available, please be sure that you have added all necessary funds and departments and have them linked appropriately. For additional assistance, please see the Customize Units guide.

Entering Data on the Form 1

For each line item, Form 1 collects five pieces of information:

- (1) Sub-Category
- (2) Line Item Code
- (3) Description
- (4) Published Amount
- (5) Adopted Amount.

Select Category Tab

The screenshot shows a web interface for entering data. At the top, there are four tabs: 'Personal Services', 'Supplies', 'Services And Charges', and 'Capital Outlays'. Below the tabs is a table with the following columns: 'Sub-Category', 'Line Item Code', 'Description', 'Published Amount', and 'Adopted Amount'. The 'Sub-Category' column has a dropdown menu with 'Salaries And Wages' selected. The 'Line Item Code' column has an empty text box. The 'Description' column has an empty text box. The 'Published Amount' column has a text box with a dollar sign prefix. The 'Adopted Amount' column has a text box with a dollar sign prefix. There is a '+ ADD' button on the left side of the table.

The **Sub-Category** field simply breaks down the selected category to additional sub-categories. You will also note an “other” category in the event your line item does not clearly fall into a specific sub-category.

The **Line Item Code** field collects your local code. This may be the State Board of Accounts codes for expenses or your own local tracking codes. Some units do not use Line Item Codes. Entry of a code in this field is optional. The field is included to assist you in tracking your expenses back to your local record-keeping.

The **Description** field should be filled out. This field is mandatory, but is a local description and does not need to tie back to any prescribed code lists.

For each line item, Form 1 collects two values: the published amount and the adopted amount. The **Published Amount** is the amount that is proposed at the beginning of the budget process and published in the newspaper. The **Adopted Amount** is the amount that is approved by the fiscal body and adopted by ordinance or resolution.

Adding a New Line Item

To add a new line item, first select the appropriate category from the blue tabs at the top of the form. You will then select the appropriate sub-category from the drop down menu, add a line item code if you would like, and then add a description of the expense. You may also enter the amounts at the same time. Now that the data is entered, you can save it by selecting the “+ADD” button on the left hand side.

Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount	
+ ADD	Communication And Transportation	0101-002	Travel	\$ 500	\$

Entering Data on an Existing Line Item

To enter amounts on an existing line item simply type in the amount and click save.

Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount
X	Office Supplies	61101	Office Paper	\$ 300	\$
+ ADD	Office Supplies			\$	\$
TOTALS BY CATEGORY				Total: \$ 0	Total: \$ 0
TOTALS BY FUND				Total: \$ 125,000	Total: \$ 125,000
TOTALS BY UNIT				Total: \$ 125,000	Total: \$ 125,000

Form values saved at 12:00 PM and 55 seconds. **SAVE**

Deleting a Line Item

If you would like to delete an existing line item select the “red X” on the far left of the page. This will delete a single line item. If an error is made on the description, line item code, or sub-category field you will want to delete the line item and enter it below, making sure to select the “+ADD” button once finished.

Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount
X	Office Supplies	61101	Office Paper	\$ 300	\$ 100

Copying Published Amounts to Adopted

If your budget is adopted without any changes you may easily copy your published amount column to the adopted amount with a simple click of the blue copy arrow. This will copy all the amounts in the current category of the selected fund and department.

Personal Services						
Supplies						
Services And Charges						
Capital Outlays						
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount
✗	Salaries and Wages	51101	Regular	\$ 50,000	 	\$ 50,000
✗	Salaries and Wages	511011	Longevity	\$ 40,000		\$ 40,000
✗	Employee Benefits	51201	PERF - Regular	\$ 15,000		\$ 15,000
✗	Employee Benefits	51220	FICA	\$ 10,000		\$ 10,000
✗	Employee Benefits	51221	Medicare Tax	\$ 5,000		\$ 5,000
✗	Employee Benefits	51295	Insurance	\$ 5,000		\$ 5,000

You will want to navigate to each combination of funds and departments to complete the adopted amounts for all of your line items.

If your adopted amounts have changed from your published amounts, simply type in the adopted amounts and click “save” at the bottom of the form.

Personal Services						
Supplies						
Services And Charges						
Capital Outlays						
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount
✗	Office Supplies	61101	Office Paper	\$ 300		\$ 100
+ ADD	Office Supplies			\$		\$
TOTALS BY CATEGORY				Total: \$ 300		Total: \$ 100
TOTALS BY FUND				Total: \$ 125,300		Total: \$ 125,100
TOTALS BY UNIT				Total: \$ 125,300		Total: \$ 125,100
Form values saved at 12:12 PM and 01 seconds.						 

Signing the Form Electronically

At the bottom of Form 1, there is a box for you to use to place an electronic signature on the form. Only the user with submission rights will see the signature box.

Form Signature

NAME

TITLE

SIGNATURE/PIN
 ⓘ

DATE

 SIGN AND DATE FORM

I hereby acknowledge that the submission of this document through the Gateway password and PIN system constitutes an "electronic signature" as defined in IC 5-24-2-2. This submission is intended to, and hereby does, constitute authentication and approval of the submitted document as required by the Indiana Code. I understand that this electronic signature takes the place of my handwritten signature and accomplishes the same purposes as would my handwritten signature in the same circumstance. I further acknowledge that this electronic signature has the same force and effect as my handwritten signature and can and will be used for all lawful purposes. I affirm that I have the real and apparent authority to electronically sign and submit this document on behalf of the unit.

The signature box will be invisible to users with edit or read-only rights.

To sign the form, first type your name and title into the signature box. After that, you will need to enter a four-digit PIN code. This PIN code has been sent to the person with submission rights via email. You may contact the DLGF at gateway@dlgf.in.gov or at 317-232-3777 in the event that you have lost or not received a PIN code. Once you select "Sign and Date Form," today's date will automatically populate the date field.

Form Signature

NAME

TITLE

SIGNATURE/PIN
 ⓘ

DATE

Form signature values saved at 02:54 PM and 58 seconds.

 SIGN AND DATE FORM 

Once you see the red text stating "Form Signature Values Saved," you have successfully signed Form 1.

Marking the Form “Ready to Submit”

At the bottom of Form 1 and all other forms you will notice the “Ready to Submit” status boxes. Before you complete the form you will notice a grey box that is titled “Not Ready to Submit.”

The 2013 budget forms now have a feature built in called validation. This does not allow the form to be marked as “Ready to Submit”, or be submitted until the required fields are completed. Validation will help prevent some commonly found errors in the 2012 Budget. Under a closer look, you will notice that the box states,

“You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.”

 **Not Ready To Submit** 

You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.

Once information has been entered in the published and adopted columns, and you have signed the form with your PIN the yellow “Ready to Submit” option will appear. This gives users the ability to mark the form as “ready to submit” by clicking on the check box. You will not want to check this box until all the line items, published, and adopted amounts columns are entered.

Ready to Submit 

This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

Once this box is checked, the box will turn green and the form will now be marked as “Ready to Submit.” Form 1 will still be editable until it is submitted.

Ready to Submit 

This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

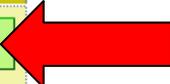
Note that after Form 1 has been marked as “Ready to Submit,” Form 1 under the Budget Form Menu now shows a green submit option.

Current Year Financial Worksheet: Additional Calculations for Form 4B 

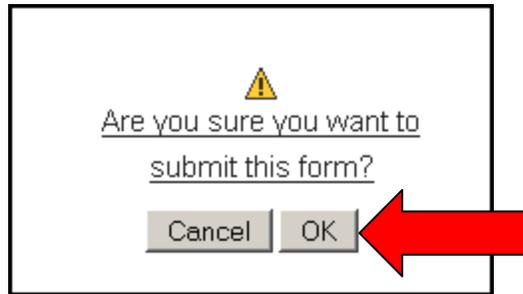
Debt Worksheet 

Form 1: Budget Estimate 

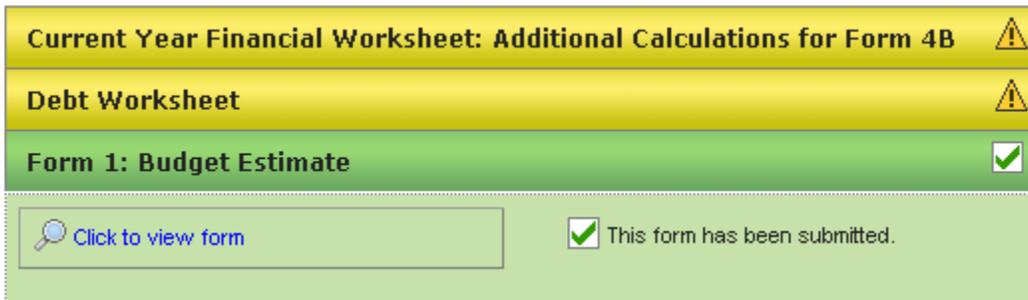
 [Click to edit form](#)  [Click to submit completed form to DLGF](#)



If you have completed your Form 1 and will not need to make any changes, you may click on the green submit button. You will notice a pop-up box asking you if you are sure you want to submit this form. If you are sure simply press “OK.”



As you will note below, Form 1 on the Budget Form Menu will now appear green and will now only have the option to view the form.



You may no longer edit a form once it is submitted. If you have submitted a form by mistake please contact the DLGF at gateway@dlgf.in.gov or at 317-232-3777.

Congratulations! You have successfully submitted your Form 1. Please see our other user guides for assistance with other forms.

Viewing and Printing the Form

At any point, Form 1s can be printed directly from Gateway. Click the button at the top-left corner of the form that reads, “Click Here for Print/Viewing Options.” Next click on the link that reads, “Print/View Form 1 for Currently Selected Fund in PDF Format.”



The screenshot shows the top portion of a web form. At the top left, there is a button with a printer icon and the text "Click Here for Print/View Options". A red arrow points to this button. Below it, a dropdown menu is open, showing a link: "Print/View Form 1 for **Currently Selected Fund** in PDF Format". A second red arrow points to this link. To the right of the menu, the text "Budget Form No. 1" is visible. Below the menu, the text "Approved by State Board of Accounts" is displayed. The main heading of the form is "BUDGET ESTIMATE FOR". Underneath, there are three dropdown menus: "Select Fund:" with "0101 - GENERAL" selected, "Select Department:" with "0000 NO DEPARTMENT" selected, and "Select Category Tab". At the bottom, there is a horizontal navigation bar with four tabs: "Personal Services" (which is highlighted), "Supplies", "Services And Charges", and "Capital Outlays".

Once you see the page appear in a new window simply click on the printer icon on the top left hand corner to print. You may also select the save icon to the right in order to save the form as a PDF which will also allow you to email copies of your Budget or post them on a website.

