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Gateway
User Guide

County Council Review Worksheet
NON-BINDING REVIEW
DUE SEPTEMBER 2, 2014
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Local Government Unit Data Entry

County Council Review Worksheet Overview

Indiana Code 6-1.1-17-3.5 requires county fiscal bodies to annually review the proposed budgets, tax levies, and tax rates of certain civil taxing units and to issue non-binding recommendations regarding those proposed budgets, tax levies, and tax rates.

In the past, this worksheet was completed in Excel or jointly prepared by the local official and the field representative at the budget workshop and printed. A hard copy would have to be printed on legal size paper and then delivered to the county auditor.

This form is now completed and submitted online to the county through Gateway. Only the means of submission has changed. It is very important to submit this report by **September 2, 2014** at the latest, to aid proper budget approval.

Accessing the County Council Review Form

First, navigate to the Unit Main Menu by logging into Gateway, clicking on “Budgets” and selecting the appropriate unit. Unlike most forms that are completed through selecting “View Forms, Enter and Edit Budgets,” this worksheet will be accessed by selecting “County Council Review Worksheet” on the left-hand side of the Unit Main Menu.
Ensuring Proper Options are Available on the Form

The availability of funds on the County Council Review Worksheet (CCRW) is based upon the customization of the fund list. Currently listed in the table are all of the standard funds. Please be sure that all the necessary funds have been added in the Customize Funds List of the Customize Unit Menu. For assistance with adding a fund, please see the Adding, Deleting, and Connecting Funds and Departments user guide.

Entering Data on the CCRW

The online CCRW has not changed what data is entered; only the formatting has changed. Information will need to be entered in the NAV section and in all three tabs of this worksheet. Data may be pulled automatically from Form 4B with a single click of a button or entered manually. Prior to pulling data from Form 4B, ensure the NAV and the published amounts of line 1, line 16, and line 17 in Form 4B for all non-home-ruled funds are complete and correct.

Pulling the Data from Form 4B: RECOMMENDED

If the net assessed valuations and the published amounts of line 1, line 16, and line 17 of the Form 4B for all Department reviewed funds are complete and accurate, all the information required for the form can be pulled in a single click.
After completing and verifying the required information in Form 4B, the data can be brought in by clicking the blue, “Copy All Fund Data from Form 4B,” button at the top of the page. Clicking this button will pull in and save all the figures as entered in Form 4B.

Once clicked, the entire form will populate with the data entered on Form 4B. Please be sure to review this information for accuracy and completeness. For each fund, the net assessed value, budget estimate, tax levy, and tax rate should be entered. By default, the page displays the NAV and budget amounts. Please click on the levy and rate tabs to ensure that all data is entered. Some funds may not have a tax levy or tax rate.

**Manual Data Entry**

The second option to completing this worksheet is through manual data entry. The worksheet has been divided into four separate sections in order to allow a once legal sized form to fit into Gateway.

**Top Half of the Form**

This top section of the form asks for a few pieces of information, much of which will be completed after submitting the worksheet to the county. As the unit undergoing non-binding review, you will need to enter the 2015 Estimate Net Assessed Valuations for each Department reviewed fund. These are the same Net Assessed Values found at the top of Form 4B for each fund.

To manually enter the 2015 NAV for a fund, click the “Edit” link towards the right of fund name.
After entering the 2014 NAV for a fund, click the “Update” link on the right-hand side to save the data entered.

Next, click the “Edit” link and continue entering data for the remaining funds.

**Bottom Half of the Form**

The bottom half of the form is divided into three different sections or tabs. These function similar to the Form 1 and Form 2 category tabs. All three tabs must be complete before submitting the form.

**Budgets Tab**

The first tab that is titled “Budget” requests the 2015 unit proposed budget amounts. These are the same amounts that are listed on the published column of line 1 of Form 4B. Please enter the 2015 proposed budget for each Department reviewed fund.

Following the same manner as above, click the “Edit” link to the right, enter the amount and then select the “Update” link. Please be sure to enter amounts for all Department reviewed funds.

After entering data and saving the amount, the next three columns will calculate automatically.

**Levy Tab**

The second section titled “Levy,” can be accessed by clicking on the Levy tab. This section requests the 2015 unit proposed levy amounts. These are the same amounts as listed on the published column of line 16 of Form 4B. To enter a levy, click the “Edit” link to the right, enter the amount and then select the “Update” link. Please be sure to enter amounts for all Department reviewed funds.
Please enter the 2015 proposed levy for each Department reviewed fund. To complete this section, click the “Edit” link on the right, enter the amount and then click “Update.”

Rate Tab

The last section titled “Rate,” can be accessed by clicking on the third tab. This section requests the 2015 unit proposed tax rates. These are the same amounts as listed on the published column of line 17 of the Form 4B. To enter a rate, click the “Edit” link to the right, enter your amount, and then select “Update.” Please be sure to enter amounts for all Department reviewed funds.

Please enter the 2015 proposed rate for each Department reviewed fund. To complete this section, click the “Edit” link on the right, enter the amount, and then click “Update.”

Signing and Submitting the Form Electronically

At the bottom of the CCRW, there is a box for the user to place an electronic signature on the form. Only the user with submission rights will see the signature box.
To sign the form, first type your name and title into the signature box. After that, you will need to enter your four-digit PIN code. This PIN code has been sent to the person with submission rights via email. You may contact the Department 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 click “Sign and Submit,” today’s date will automatically populate the date field and the form will be submitted.

Once you see the date populate the date field and the Sign and Submit button disappear, you have successfully signed and submitted the CCRW.

If the form is submitted by mistake, it may be un-submitted before the deadline by clicking the red “Click here to unlock the form” button. Ensure that the form is submitted by the deadline if it is unlocked for corrections. If a user makes a correction near the submission deadline, he or she may want to notify the county auditor.
**County Council Review**

Units must submit the form electronically through Gateway. Unfortunately, hard copies may no longer be mailed, emailed, faxed, or physically handed in to the Department. By submitting the form electronically, it will simply be a click away for the county to access. Any user with permissions to the county unit in Gateway may login and download each worksheet that was submitted.

First, navigate to the Unit Main Menu by logging into Gateway, clicking on “Budgets” and selecting the county unit. Similarly to the Certificate of Net Assessed Valuations, this worksheet will be accessed by selecting “County Council Review Output” underneath the County Specific Functions section on the right-hand side of the Unit Main Menu.

The county will see a table that lists all of the units that have submitted their County Council Review Worksheet. This gives the county a chance to reach out to those units that have not submitted prior to the deadline and offer a friendly reminder.

A unit’s County Council Review Worksheet can be accessed by clicking on the “Click to View” link on the right hand side of the table. Please note that all the submitted County Council Review Worksheets can
be pulled by clicking the “View All Submitted County Council Review Worksheets” button. The units’ Form 4B’s can also be pulled by selecting the Form 4B link. Please see the section below for assistance with printing.

**Viewing and Printing the Worksheets**

Once the review worksheets or Form 4B’s have been pulled and appear in a new window, click on the image that resembles a save icon in the middle at the top of the page to view the export options.

From the list of export options, forms may be exported into a PDF, Word, Excel, or many other file types. This allows users to personalize how they wish to have the data displayed.

To quickly and easily print off the form, click on “PDF” and then click the printer icon. Excel is also a popular option.

Please note that once the County Council Review Worksheets have been submitted, the remainder of the non-binding review process will continue as in previous years.

Congratulations! You have successfully submitted your County Council Review Worksheet. Please see our other user guides for assistance with other forms. If you have any questions, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.