



Gateway User Guide

Pre-Budget Worksheet



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How do I get to the application screen in Gateway?

Each user has a specific username and password that will allow access to Gateway. The username is the email address on file with the Department of Local Government Finance (DLGF). Users without a Gateway account may contact gateway@dlgf.in.gov to register.

Web Address (URL):

<https://gateway.ifionline.org/login.aspx>

Please note that Gateway works best using **Firefox** or **Google Chrome**.

Accessing the Budget application

After signing in, users will see the “Select Application” Gateway page. Choose the “Budgets” option.

Select Application

Department of Local Government Finance (DLGF)	Deadline
Abstract	Details
Assessor Reports	Mar 31
Budgets	Details
Data Entry for CNAV and Form 22	Details
Debt Management	Details
Economic Development Reporting	Sep 30
File Transmission	Details
Other Post-Employment Benefits	Mar 1
SB 131 Reporting for SWMDs	Mar 1
TIF Management	Apr 15

On the Select Unit page, users should select their unit.

Select Unit

Select Unit from List

Currently Viewing Year:

Click a link below to select your unit.

Unit Code	Unit Name Link	Unit Type	Unit County	User Role
0000	County	County		Submitter



Navigate to the Pre Budget Worksheet

Once the unit is selected, users will be directed to the Unit Main Menu page. To access the Pre Budget Worksheet, the user should select the "Pre Budget Worksheet" button.

[Select Unit](#) > **Unit Main Menu**

Selected Year: 2019 | Selected Unit: _____ County - _____ City _____, _____ Co.

Unit Main Menu - _____ City _____, _____ Co.

Select from the options below to customize your unit's funds, departments, and/or publications.

Department of Local Government Finance Tasks



Pre-Budget Worksheet



Provide information and estimates in advance.

Not Submitted



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 Signed Form 4 and Other Documents

View, upload and submit budget-related documents to DLGF.



Property Tax Cap Info

View Property Tax Cap Data Currently Entered on all Forms



Optional Flat File Upload

Fund List, Department List, Fund-Dept Relationship, Form 1, Form 2



Pre-Budget Worksheet

On the Pre Budget Worksheet page, users will select “Yes” or “No” for a series of questions. For each answer of “Yes”, you will be prompted to complete another section pertaining to the question. Once all sections are marked as complete, the worksheet will be ready for submission by the authorized submitter.

[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#)

Pre-Budget 2019 Worksheet

Dlgr City 11
Gateway1 County
Not Submitted

Please answer the following questions. For each answer of “Yes”, you will be prompted to complete another section pertaining to the question. Once all sections are marked as complete, the worksheet will be able to be submitted by the authorized submitter.

Does Dlgr City 11 have a debt service levy in 2018 or will it have a debt service levy in 2019? For taxing units with a levy in 2018, the answer at right is automatically Yes.	<input type="radio"/> Yes <input checked="" type="radio"/> No	COMPLETED
Will Dlgr City 11 file for an excess levy appeal in 2018?	<input type="radio"/> Yes <input type="radio"/> No	NOT COMPLETED
Will Dlgr City 11 hold a referendum in 2018?	<input type="radio"/> Yes <input type="radio"/> No	NOT COMPLETED
Not applicable to Dlgr City 11	<input type="radio"/> Yes <input type="radio"/> No	
Dlgr City 11 is a township, or city/town and will be entering information about the members of its fiscal body. Please follow the steps in the Township and City/Town Fiscal Body Section to complete this question.	<input checked="" type="radio"/> Yes <input type="radio"/> No	NOT COMPLETED
Not applicable to Dlgr City 11	<input type="radio"/> Yes <input type="radio"/> No	
What are the Public Meeting and Adoption Meeting dates and times? Please follow the steps in the Public / Adoption Meeting Section to complete this question.		NOT COMPLETED
Dlgr City 11 has annexed any territory for levies effective 2019? <small>Please note that the response to this question will not directly impact your maximum levy. If you have questions about annexations and their impact on your maximum levy, please contact your Budget Field Representative. Contact information for Budget Field Representatives may be found at http://www.in.gov/dlgr/2338.htm.</small>	<input type="radio"/> Yes <input type="radio"/> No	NOT COMPLETED

If a user selects “No” to a question, it will show as “Completed”.

Does Dlgr City 11 have a debt service levy in 2018 or will it have a debt service levy in 2019? For taxing units with a levy in 2018, the answer at right is automatically Yes.	<input type="radio"/> Yes <input checked="" type="radio"/> No	COMPLETED
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If a user selects “Yes” to a question, a dropdown with a link will appear. Users will need to click the applicable blue hyperlink to get to the applicable section.

Does County have a debt service levy in 2018 or will it have a debt service levy in 2019? For taxing units with a levy in 2018, the answer at right is automatically Yes.

Yes No  NOT COMPLETED

Please follow the steps in the [Debt Service Levy Section](#) to complete this question.



Mark Section as Complete

For any questions that have been answered as “Yes”, users will need to mark the section as “complete” within the appropriate section. To mark the section as complete, simply click the box next to “Mark this section complete”.

Mark this section complete?


Debt Service Levy Section

On the Debt Section page, users will select whether or not their unit anticipates issuing new debt in 2018. Users may also click a link to add a new debt service fund or to link debts to a debt service fund. For all debt that has been issued, users should enter the debt in Debt Management, then link the debt to a debt service fund.

Users will also be prompted to enter the estimated June 30 cash balance for any debt service funds.

[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#) > [Debt Section](#)

Binding Adoption Units Section

County, 2019 Pre-Budget Worksheet

County anticipates issuing in 2018.

County DOES NOT anticipate issuing new debt in 2018
 County DOES anticipate issuing new debt in 2018

Debt Fund Balances: Please begin the PreBudget Debt Worksheet below and Refresh your debt information. You will then be able to enter fund balances for Debt Service.

0182 - BOND #2 needs completion on Debt Worksheet
0183 - BOND #3 needs completion on Debt Worksheet
[Go to Debt Worksheet](#)

Use the following links for quick navigation to the pages for adding new debt service funds and linking debts:

- [Customize Funds Lists](#)
- [Customize Debts by Funds](#)



Users should then click the “Go to Debt Worksheet” button to complete a debt service worksheet. The worksheet asks users to indicate when they estimate that payments will be made. For most debts, users will use a checkmark system to indicate payment dates. For certain entries, such as unreimbursed textbooks for school corporations and anticipated debt service, users will enter dollar amounts.

[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#) > [Debt Section](#) > [Debt Worksheet](#)

Selected Year: 2019 | Selected Unit: County - 0000 | County

Prescribed by Department of Local Government Finance

DEBT WORKSHEET

Selected Year: 2019

Selected County: County

Selected Unit: County

Select Fund:

[Click here to refresh Debt Data](#)

Please note that if you have already entered debt payment amounts through this page, clicking the “Click here to refresh Debt Data” button will reset those entries.

0182 - BOND #2

(This form is to be prepared for each debt service fund that requires either a tax rate or an appropriation. Debt service funds designated by an “8” in the third digit of the fund code.)

No Data Entered for this Category. Please visit refresh data link.

Excess Levy Section

On the “Excess Levy Appeal Section” page, users will provide information about any levy appeals that their unit anticipates filing in 2018. If the unit does not anticipate filing any levy appeals in 2018, then they may click the box next to “Mark this section complete”. Clicking the “Return” button will bring you back to the “Pre-Budget 2018 Worksheet” page.



To add an appeal, click the “Add New Appeal” button and complete the boxes. Please be sure to click the “Add Appeal” button before leaving the page.



[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#) > **Excess Levy Appeal Section**

Excess Levy Appeal Section

County, 2019 Pre-Budget Worksheet

Please provide information about any levy appeals that County anticipates filing in 2019. To add an appeal, click the "Add New Appeal" button and complete the boxes. Completion of this form does not constitute an excess levy appeal.

Choose the Description that matches the Appeal.

- Annexation, consolidation (reorganization), or extension of services.
- Three-year growth factor exceeding 2% of the statewide average.
- Correction of advertising errors, mathematical errors, or errors in data.
- Shortfall due to erroneous assessed valuation.
- Emergency.

Describe the Nature of the Appeal:

Anticipated File Date:

Enter the amounts for each levy type for which the appeal is for

Civil (UT)

Referendum Section

On the "Referendum" page, users will describe any referenda that the unit anticipates presenting to voters in 2018. Please note: This page does not replace any part of the statutory referendum process and does not serve as an approval from the Department.



[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#) > **Referendum**

Referendum Section

Hartford Township, 2019 Pre-Budget Worksheet

Please describe any referenda that Hartford Township anticipates presenting to voters in 2018. This page does not replace any part of the statutory referendum process and does not serve as an approval from the Department.

Add/Edit Referendum

Referendum Types: Capital Projects Operating

Referendum Election: May November

Describe the nature of the referendum.

Maximum Tax Rate imposed if passed in 2019

Mark this section complete?

Binding Adoption Section

On the “Binding Adoption Units Section” page, units subject to a binding adoption by another taxing unit in 2019 will indicate which unit is the adopting body in 2019. To do this, use the dropdown to select the appropriate adopting body from the list, and then click the “Save binding unit” button.

[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#) > **Binding Adoption Units Section**

Binding Adoption Units Section

, 2019 Pre-Budget Worksheet

Last year binding unit:

Please indicate which unit is the adopting body for _____ in 2019

- Select unit from list -



Township and City/ Town Fiscal Body Section

On the “Township and City/Town Fiscal Body Section” page, users will enter all fiscal body members and indicate whether they are volunteer firefighters in a volunteer fire department or a fire department that provides fire protection services to the taxing unit. To do this, users will enter the name of the Fiscal Body Member, indicate whether or not the Fiscal Body Member is a Volunteer Firefighter, and then click the “Add Board Member” button.

[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#) > [Township and City/Town Fiscal Body Section](#)

Township and City/Town Fiscal Body Section Township, 2019 Pre-Budget Worksheet

Please enter all fiscal body members and indicate whether they are volunteer firefighters. Pursuant to IC 36-1-23, a member of a fiscal body of a city, town, or township may not participate in a vote on the adoption of the city, town, or township’s budget if the member is a volunteer firefighter in a volunteer fire department or a fire department that provides fire protection services to the taxing unit. If a fiscal body seat is currently unfilled, please list “Vacant” for that seat.

Add/Edit Fiscal Body Member

Name of Fiscal Body Member

Is the Fiscal Body Member a Volunteer Firefighter in a volunteer fire department or a fire department that provides fire protection services to the taxing unit?

Yes
 No

*User must enter at least 3 board members to mark this section complete.

Pursuant to IC 36-1-23, a member of a fiscal body of a city, town, or township may not participate in a vote on the adoption of the city, town, or township’s budget if the member is a volunteer firefighter in a volunteer fire department or a fire department that provides fire protection services to the taxing unit.



County Estimates Section

On the “County Estimates Section” page, users will enter their 2018 estimates for their developmental disabilities levy adjustment. Please be sure to click the “Save Estimates” button after entering your 2018 estimates.

[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#) > **County Estimates Section**

County Estimates Section

County, 2019 Pre-Budget Worksheet

Counties should estimate their developmental disabilities levy adjustment for 2019. The maximum allowable developmental disabilities levy adjustment cannot be calculated until the Assessed Value Growth Quotient is released. 2018 levy adjustments are listed as an aid when developing estimates. These estimates are not binding.

Please note that, pursuant to HEA 1141-2018, beginning with 2019 budgets, the mental health levy adjustment will be automatically computed for counties.

	2018 Adopted	2019 Estimated	2019 Estimated
Developmental Disabilities Levy Adjustment	\$175,000	\$0	<input type="text" value="0"/>

Mark this section complete?



Public/ Adoption Meeting Section

On the “Public/Adoption Meeting Section” page, users will use the pop-up calendar to select the estimated dates of the public hearing and adoption meeting to be held in 2018. These dates are estimates only and are not binding. Please be sure to click the “Save Public/Adoption Meeting information” button after entering your hearing date and meeting date.

[Select Unit](#) > [Manage Unit](#) > [Pre-Budget 2019 Worksheet](#) > Township and City/Town Fiscal Body Section

Public/Adoption Meeting Body Section County, 2019 Pre-Budget Worksheet

Please enter Public/Adoption Meeting information. These dates are estimates only and are not binding.

Public Meeting Info

Hearing Date:

Hearing Time: 12:00 AM

Adoption Meeting Info

Meeting Date:

Meeting Time: 12:00 AM

August, 2018						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	Wednesday, August 15, 2018		
2	3	4	5	6	7	8

Today: March 29, 2018

Additional Information

The bottom of the main page also includes an optional text box where users may enter additional information. Please enter any information in this textbook that you believe is important to share.

Please provide any other information that you believe is important to share. If you anticipate that you will take less than a full operating balance on a debt service fund or less than the statutory maximum levy for other funds, please provide details in the comment box below.



Questions

Questions related to the submission of the Pre-Budget Worksheet may be directed to Billy Ottensmeyer (Project Coordinator) at gateway@dlgf.in.gov or (317) 234-4480.