Gateway User Guide

Form 1
Budget Estimate
Advertised vs. Adopted
by Fund

Updated 06/18/2019

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How do I get to the application screen in Gateway?

As an authorized user of the Indiana Gateway for Government Units ("Gateway"), users will have a username and password that will allow access the program. The username is the email address on file with the Department of Local Government Finance ("Department"). The Department will assign an initial password, which should then be changed by the owner to something unique and confidential. Users are responsible for all information entered into Gateway under the authorized user's username and password. Users without a Gateway account may contact gateway@dlgf.in.gov to register.

Web Address (URL): https://gateway.ifionline.org/login.aspx

To access Gateway, open Firefox or Google Chrome and type https://gateway,ifionline.org/login.aspx into the browser, and then hit "Enter" on a standard keyboard. Gateway works best using Firefox or Google Chrome. Internet Explorer is not a supported browser.

Form 1 Overview

This form is used to collect the information of how your unit appropriates its spending for the year. The process begins with the fiscal officer estimating their desired spending for the next year. Next, they enter these amounts in the desired budget line items in the advertised column. Any previously used line items roll over from the previous year, and the official can simply enter the appropriation estimate amounts for the budget year. New line items can be added, obsolete ones can be deleted, and the report can be customized to reflect the unit's spending. Ultimately, the adopted column should reflect the final decision of the fiscal board's approved budget. This is then used as the starting point of spending for the unit for each appropriation. The State Board of Accounts may use this as a guideline when auditing that budget year. Once this form is completed, the figures can be pulled across other applicable forms.

Accessing Form 1

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

Select Unit > **Unit Main Menu**

Selected Year: **2020** | Selected Unit: Gateway1 County - 9983 Dlgf City 1, Gateway1 Co.

Unit Main Menu - 9983 Dlgf City 1, Gateway1

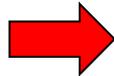Select from the options below to customize your unit's funds, departments, and/or publicatio

Department of Local Government Finance Tasks

Pre-Budget Worksheet - Submitted on 6/4/2019 10:30:13 AM

Provide information and estimates in advance.

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

From the Budget Form Menu, select "Form 1: Budget Estimate" and notice the menu expands beneath Form 1. Then click on the link on the left side of the Form 1 box that says "Click to edit form."

Form 1 navigates through a drop down menu that allows users to select a fund and department. Please note that school units will use the Department field in place of their Program Accounts. As shown below in the department listing, 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. For more information on Fund & Department Customization, please see the **Adding, Deleting and Connecting Funds and Departments User Guide.**
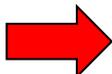
Gateway INDIANA
for government units
An information for Indiana Data Site

If a unit previously completed a budget in Gateway, the user should notice the funds, departments, and line items with data entered carry over from the previous year.

Note: Line items in the Capital Outlays and Debt Service tabs are the exception, and will not roll over.


Ensuring the Proper Number of Forms are 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 all necessary funds and departments have been added and linked appropriately to each other. For additional assistance, please see the **Adding, Deleting, and Connecting Funds and Departments User 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) Advertised amount
        (5) Adopted amount.
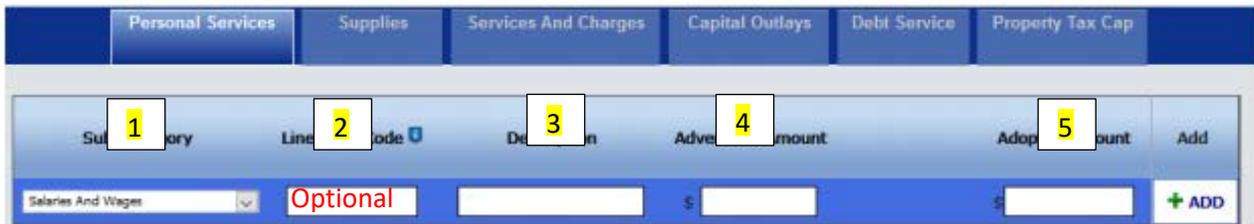
The **Sub-Category** field simply breaks down the selected category to additional pre-defined subcategories. The categories are Personal Services, Supplies, Services and Charges, Capital Outlays, Township Assistance (Townships only), Debt Service, and Property Tax Cap (for all non-debt service funds).

The **Line Item Code** field collects the local code. This may be the State Board of Accounts codes for expenses or a user's own local tracking codes. Entry of a code in this field is optional; therefore, some Units do not use Line Item Codes. The field is included to assist in tracking expenses back to local recordkeeping.

The **Description** field is mandatory. This is the local description. It does not need to tie back to any prescribed code lists.

For each line item, Form 1 collects two values: the advertised amount and the adopted amount. The **Advertised Amount** is the amount that is proposed at the beginning of the budget process by the Fiscal Officer, and is advertised on the Form 3 on Gateway. The **Adopted Amount** is the amount that is approved by the Fiscal Body, and adopted by ordinance or resolution on the Form 4.

Expenditure Code List

Please reference the State Board of Accounts' expenditure code list when adding in new expenditures. The current expenditure code list can be found at: **SBOA Disbursement Codes.**

Adding a New Line Item

To add a new line item:
1. Select the appropriate category from the blue tabs at the top of the form.
2. Next, select the appropriate Sub-Category from the drop down menu.
3. Type in a Line Item Code.
4. Then type in a Description of the expense.
5. Enter in the amounts for the Advertised column.
6. After data entry is complete, save by selecting the "+ADD" button on the left hand side.

Editing Line Items

In most cases, the Form 1 contains some pre-existing line items that have rolled over from the previous year. In the event that a line item code or description needs to be edited, click in the field that you wish to edit and make the desired changes. After edits are complete, click the "Save" button on the bottom right-hand side of the page.

Entering Data on an Existing Line Item

To navigate within this form, you can click on the categories on the blue bar. This will open up any existing line items. To enter amounts on an existing line item, simply select the field, enter the amount, and click "Save".

Property Tax Cap

For Pay 2020, a new category was introduced titled Property Tax Cap. This category will appear as an option for all non-debt service funds, and allows for the unit to account for Circuit Breakers. If a unit is departmentalized, this will appear as a new department as code 0082. The line items that were generated for Pay 2020 will still remain. Each unit may complete this line item with either the Department provided estimates or their own estimates.

While the amounts entered into these line items will increase the totals at the bottom of the Form 1s, please remember that this form will be your Gross budget when property tax cap credit amounts are entered. The amounts entered into this line item will not change your advertised, adopted, or certified budget amounts. Those will be your Net budget, or all expenditures minus the property tax cap credits.

Please contact your Budget Field Representative with any questions.

If you are not departmentalized, your screen will be populated with the line item necessary, and still display "0000 NO DEPARTMENT". Once you have selected the "Property Tax Cap" category, simply enter your Property Tax Cap amount, and click "SAVE".

If your unit is departmentalized, you will first change the department to "0082 PROPERTY TAX CAP IMPACT – BUDGET PURPOSES ONLY". From here you will select the category, and then you will see the line pre-generated. Now just enter your amount for this particular fund, and click "SAVE".

Deleting a Line Item

To delete an existing line item select the red "**X**" on the far right of the page. This will delete a single line item. If an error is made on the sub-category field, delete the line item and enter it below. **After** data entry is complete, save by selecting the "+ADD" button on the right hand side.

	Personal Services	Supplies	Services And Charges	Capital Outlays	Debt Service	Property Tax Cap

Sub-Category	Line Item Code	Description	Advertised Amount		Adopted Amount	Add/Delete
Office Supplies		Office Paper	$ 300	COPY	$	✖

Copying Advertised Amounts to Adopted

If the budget looks like it will be adopted without any changes, amounts from the advertised column may be easily copied to the adopted amount column for the selected fund just by clicking the blue button in the top right corner "Copy all Advertised Amounts for All Funds" button. This will copy amounts for all funds. You may also want to move everything over to the adopted column as a starting point for the adopted amounts.

<mark>Note: Once your Form 3 has been submitted, the advertised amounts are not to be changed. Any changes are to be in the adopted column only.</mark>

Select Fund:

0101 - GENERAL

Select Department:

0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)

Copy ALL Advertised Amounts for ALL Funds

Select Category Tab

Personal Services	Supplies	Services And Charges	Capital Outlays	Debt Service	Property Tax Cap

To be more selective about what amounts are copied, click on the blue "COPY" arrow between the advertised and adopted column. This will only copy the amounts in the current category of the selected fund and department.

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

If the adopted amounts have changed from the advertised amounts, simply type in the adopted amounts and click "Save" at the bottom of the form. As long as the fund total does not exceed the advertised fund total amount, you may move amounts between line items.

Signing the Form Electronically

At the bottom of Form 1, 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. 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 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 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 there are "Ready to Submit" status boxes. Before the form is entirely complete, there will be a grey box titled "Not Ready to Submit."

The budget forms have a feature built in feature 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 previous years. Upon closer review, 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 'Advertised' 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 advertised and adopted columns, and the form has been appropriately signed with a 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. Do not check this box until all the line items, advertised, and adopted amounts 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 section will turn green and the form will now be marked as "Ready to Submit." Form 1 will still be editable until it is submitted.
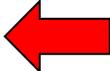
☑ Ready to Submit 🛈

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." Under the Budget Form Menu Form 1 now shows a green submit option for officials with submission rights.

Do not submit any Budget forms with the exception of the Form 3 until your unit has adopted its budget.

|	
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

After your budget has been adopted, you may now click on the green "Click to submit completed form to DLGF" button.

A pop-up box asking if you have checked the Error Prevention Report. If you are ready to submit, simply press "OK."


After the form has been successfully submitted, Form 1 on the Budget Form Menu will now appear green, and will now only appear in "read only" form.
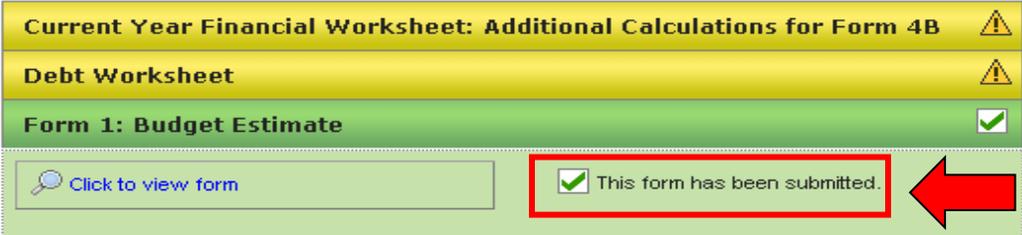
The form may no longer be edited once it has been submitted. If a form has been submitted by mistake, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.

Viewing and Printing the Form

At any point Form 1 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." From here, the user will have the option to print the currently selected funds or all funds. Please select one.
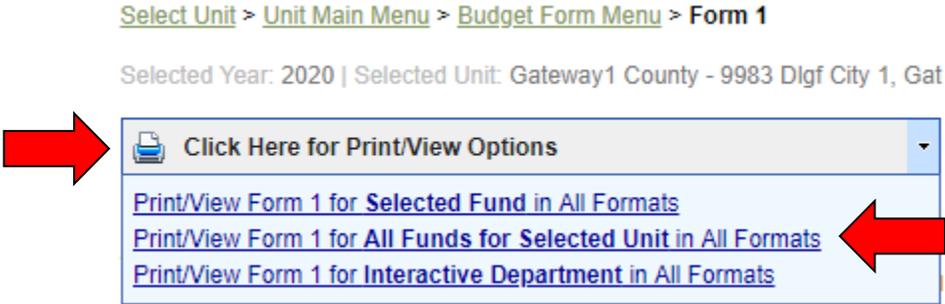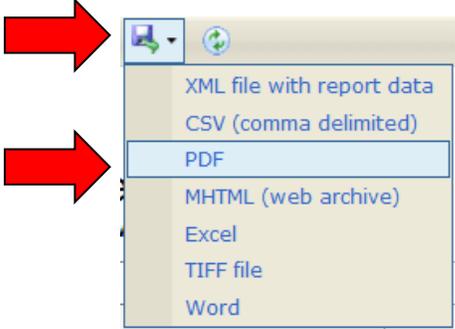
The page will open in a new window. Once it is open, click on the icon that resembles a save icon in the middle at the top of the page to view the export options.
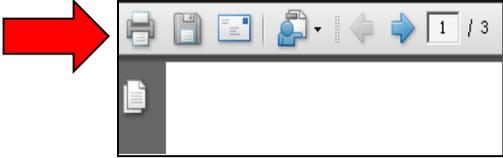

From the list of export options, Form 1 may be exported into a PDF, Word, Excel, or many other different file types. This allows users to personalize how they wish to have the data displayed.

To quickly and easily print off the form, click on "PDF" and then click the printer icon.

Congratulations! Form 1 has been successfully submitted. Please see the 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) 234-4480.