# Gateway
# User Guide

## Form 4A
## Budget Report

Updated 7/1/19

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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 4A Overview

Form 4A presents the unit's gross budget subtotaled by fund, department, and major classification (Personal Services, Supplies, Other Services and Charges, Capital Outlays, Township Assistance, Debt Service, and Property Tax Cap). This is simply a summary of what has already been entered on the Form 1, and can be pulled in with a simple click of a button. For this form to be completed accurately, please be sure that your Form 1 is already completed before beginning the Form 4A.

# Accessing the Form 4A

First, navigate to the Budget Form Menu by selecting the unit and then click "View Forms, Enter and Edit Budgets."
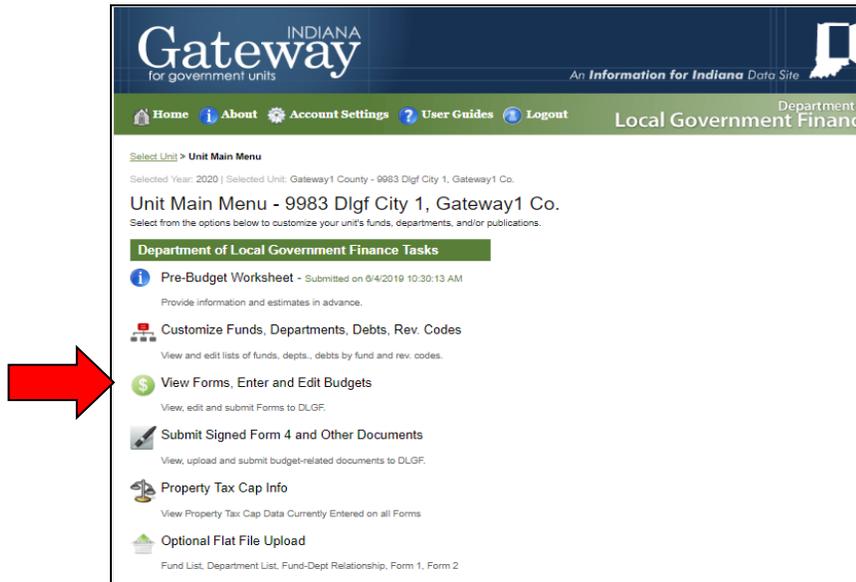


From the Budget Form Menu, click on the link on the left side of the Form 4A box that says, "Click to edit form." This will load the form.
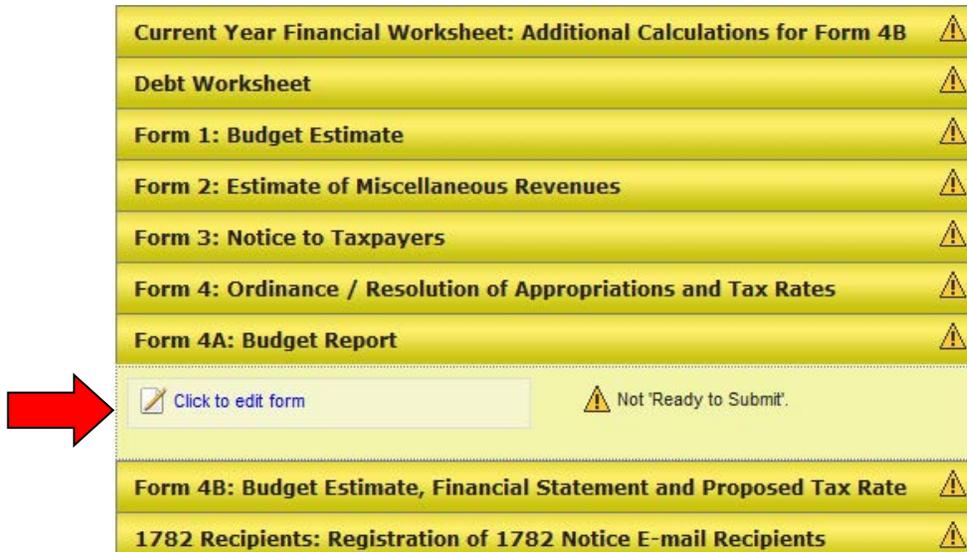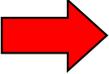
# Ensuring Proper Options are Available on the Form

Form 4A is divided using drop-down menus. The first drop-down menu allows users to select a fund. Once a fund is selected, Gateway will populate a second drop-down menu from which to select the department. If you are departmentalized, they will appear here.



To ensure that the proper options are available in these drop-downs, all three steps on the left-hand side of the Customize Unit area must be complete. For assistance, please view the **Customize Units user guide.**



If Form 4A looks like the image below for a particular fund, that means that the fund-department link has *not* been specified in the Customize Unit area. If a unit of government is not departmentalized, the department field may be left as "0000 No Department."
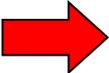
## Details of the Form 4A

For each subcategory, Form 4A collects two pieces of information: the Advertised Amount and the Adopted Amount.



| DEPARTMENT: 0001 CLERK OF CIRCUIT COURT (COUNTY CLERK) | | | |
|---|---|---|---|
| | Published Amount | | Adopted Amount |
| PERSONAL SERVICES | $ 100 | | $ 200 |
| SUPPLIES | $ 300 | | $ 400 |
| OTHER SERVICES AND CHARGES | $ 0 | Copy | $ 0 |
| CAPITAL OUTLAY | $ 0 | | $ 0 |
| DEBT SERVICE | $ 0 | | $ 0 |
| TOTAL | $          400 | | $          600 |

The **Advertised Amount** is the amount that is proposed at the beginning of the budget process and advertised on the Form 3. The **Adopted Amount** is the amount that is approved by the fiscal body and adopted by Ordinance or Resolution by means of the Form 4. Form 4A summarizes the amounts previously entered in Form 1 into category totals.

## Option 1: Completing the Form 4A by Pulling in Form 1 Values

Form 4A is simply a summary of Form 1. Provided that at least the advertised column of Form 1 has been entered, the Form 1 amounts can be pulled into Form 4A by clicking the button that says "Click to Insert All Unit Amounts from Form 1." Clicking this automatically pulls the values from all the funds and departments in the Form 1 into the Form 4A in a single click. This is your best option for accuracy.



This copy function is the simplest way to ensure you have the correct amounts listed without error. It is crucial to have this accurate, as these figures are pulled into Form 4B later on, and ultimately Form 4.

> ⚠️ If you happen to change any information on Form 1, it is important to re-pull the information into Form 4A. This will help prevent incorrect amounts being pulled into other forms. ⚠️

## Option 2: Completing the Form 4A Manually

If you would like to manually enter the amounts for each fund, department, and category separately, you do have that ability. Go to your first fund, select the department, and then manually enter each category amount in the boxes provided, separated out by advertised and adopted. Then you will manually change the departments within each fund, and do the same. Ultimately you need to complete these steps for all funds.

**Select Fund:**
0101 - GENERAL

**Select Department:**
0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)

Click to Insert All Unit Amounts From Form 1

| DEPARTMENT: 0001 CLERK OF CIRCUIT COURT (COUNTY CLERK) | | |
|---|---|---|
| | Published Amount | Adopted Amount |
| PERSONAL SERVICES | $ 100 | $ 200 |

## Signing the Form Electronically

At the bottom of Form 4A, 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.

**Form Signature**

NAME

TITLE

SIGNATURE/PIN  ℹ️

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.

To sign the form, first type your full 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 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.
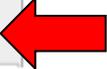


Once you see the red text stating Form Signature Values Saved, you have successfully signed Form 4A.

# Marking the Form "Ready to Submit"

At the bottom of Form 4A, there is a "Ready to Submit" status box. Before the form is entirely complete, there will be a grey box that is titled "Not Ready to Submit."

The budget forms 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 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."



Once information has been entered in the advertised 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 published and adopted amounts columns are entered for all funds.
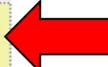
Once this box is checked, the box will turn green and the form will now be marked as Ready to Submit. Form 4A can still be edited until it is submitted.
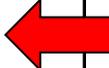


Note that after Form 4A has been marked as "Ready to Submit", Form 4A under the Budget Form Menu now shows a green submit option.



After you have officially adopted your budget, you may click on the green "Click to submit completed form to DLGF" button. A pop-up box asking if you are sure you want to submit this form. If you are ready to submit, simply press "OK."



As noted below, Form 4A on the Budget Form Menu will now appear green and will now only have the option to view 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.

# Viewing and Printing the Form

At any point, Form 4A 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 4A for Currently Selected Fund in PDF Format."



Once the page appears in a new window, 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, you may export your document into a PDF, Word, Excel or many other different file types. This allows you to personalize how you wish to have your data displayed. If you choose to open your document in PDF you will see the following page appear. You may 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 a copy of your document as a PDF.
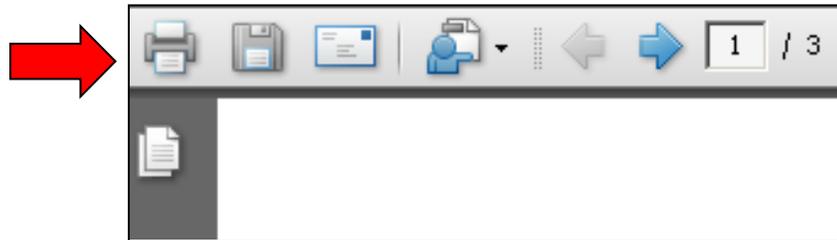


Congratulations! You have successfully submitted Form 4A. Please see the other user guides for assistance with other forms. If you have any questions, please contact the Department at gateway@dlgf.in.gov or at (317) 234-4480.