

# Department of Local Government Finance

# **Gateway Overview**

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February 2024



### Disclaimer

• This presentation and other Department of Local Government Finance materials are not a substitute for the law. The following is not legal advice, just an informative presentation. The Indiana Code always governs.



# Agenda

- DLGF Support.
- Brief History of Gateway and Gateway Basics.
- How to gain and delegate access in Gateway.
- Deadlines and the DLGF website.
- The different Gateway applications.
- Affirmations.
- Public side of Gateway.



# **DLGF Support Best Practices**

- Support@DLGF.in.gov
- Please include screenshots anytime you have an error message.
- Please include the URL of the page in your support requests.
- Please copy your Budget Field Rep on support requests related to a delay in the submission, adoption, or certification of information required by the Department.
- The Department makes every effort to respond within 2 business days of all support requests.



# **DLGF Support Best Practices**

- DLGF Support works in a first come, first serve basis.
- Support requests increase <u>dramatically</u> close to deadlines. The closer you
  are to a deadline, the less likely it is that the Department will be able to
  respond to your request before the deadline.



# Other ways to contact DLGF

- Assessment Field Rep Map
  - https://www.in.gov/dlgf/files/maps/Field-Rep-Map-Assessment.pdf
- Budget Field Rep Map
  - https://www.in.gov/dlgf/files/maps/Field-Rep-Map-Budget.pdf
- Data Team Inbox
  - Data@dlgf.in.gov



# **Brief History of Gateway**

- Launched in 2010, Indiana Gateway for Government Units ("Gateway") is the online portal in which local government units in the State of Indiana submit required data. It also serves as a public access tool for citizens.
- As of February 2024, 26 different applications are used by hundreds of local units of government, schools, state agencies, casino operators, and others to submit financial and operational data to the State of Indiana.



# **Brief History of Gateway**

- State agencies utilizing the Gateway portal:
  - Department of Local Government Finance (DLGF)
  - State Board of Accounts (SBOA)
  - Indiana Education Employment Relations Board (IEERB)
  - Department of Workforce Development (DWD)
  - Indiana Gaming Commission (IGC)
  - Bureau of Motor Vehicles (BMV)
- Data submitted includes budgets, debt issuances, TIF district summaries, annual financial reports, employee compensation reports, local development agreements, and school district collective bargaining reports, among others.



# Gateway Basics - What is it?

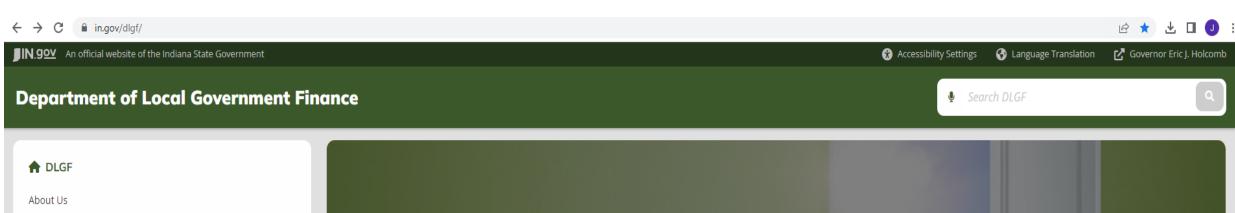
### Gateway's 3 main functions:

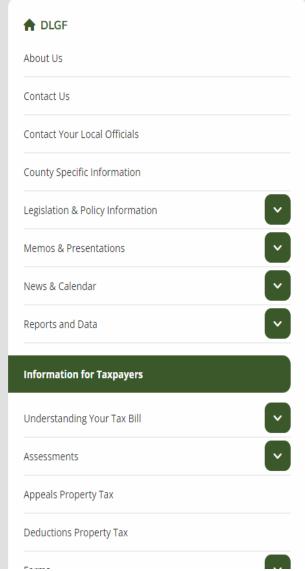
- 1. A place for local officials to quickly and efficiently submit information to various State Agencies.
- 2. A place for State Agencies to automate tasks and provide quick, meaningful feedback to local officials on that data.
- 3. A centralized data source of local government data/reports available to the public.

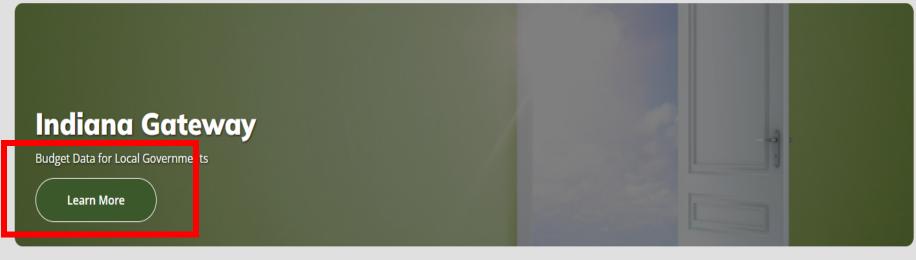


# **Gateway Basics**

- How to access the Gateway's Local Official portal: <a href="https://gateway.ifionline.org/">https://gateway.ifionline.org/</a>.
- Or <a href="https://www.in.gov/dlgf/">https://www.in.gov/dlgf/</a> and click on the "Learn More" button on the Indiana Gateway banner.
  - Click the "Local Officials: Login Here" button.
- If you need to create a user account:
  - Click the "Request Authorization to Access Gateway" link on login page.









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Learn more about property tax deductions
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### An Open Door into Local Government Finance

Local Officials: Login Here

Gateway collects and provides access to information about how taxes and other public dollars are budgeted and spent by Indiana's local units of government.













Access local expenditures



When is your budget hearing?

About Gateway . Contact Us

Indiana Gateway for Government Units is the collection platform for local units of government to submit required data to the State of Indiana, as well as a public access tool for citizens. It represents a unique partnership between the State of Indiana and the Indiana Business Research Center at IU's Kelley School of Business, with initial support from the Lilly Endowment and sustainable support from the State of Indiana.



Participating state agencies currently include the Department of Local Government Finance, the State Board of Accounts, the Indiana Education Employment Relations Board, the Indiana Gaming Commission and the State Auditor



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notify ibrctech@iu.edu.





User Guides

The Indiana Gateway for Government Units provides a central commons for local units to submit their financial forms to the State of Indiana.

**Authorized Personnel Login** User Name: Password: Forgot your password? Log In Please note: Passwords are CASE sensitive.

Request Authorization to Access Gateway

After 5 failed attempts to log in, your account will be locked-

This site works best in Firefox and Chrome. Internet Explorer is not a supported

#### Announcements

Gateway Reporting Access Authorized User Policy

The local official login portion of Gateway is accessible only by officials directly responsible for entering and submitting reports to the State. Usernames are specific to the person who receives authorization. Read full policy »

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Participating state agencies currently include the Indiana Department of Local Government Finance, the State Board of Accounts, the Indiana Education Employment Relations Board, the Indiana Gaming Commission and the State Auditor.



# **Gateway Username**

- Per the <u>Authorized User Policy</u>, an authorized users' Gateway email address, password, and PIN number is exclusively for individual use and should not be shared.
- Per the Authorized User Policy, in order for an email address to be used as a Gateway username, the email address:
  - Must be a working/valid email address.
  - May not include the name, nickname, or initials of anyone other than the associated Gateway user.
  - Must be an email address in which the associated Gateway user is the only individual with the ability to view any and all emails sent to it.
  - Must be an email address in which the associated Gateway user is the <u>only</u> individual with the ability to send emails using that email address.



# Fiscal Officer for Department Gateway Applications

- The Department considers the "Fiscal Officer" of a unit to be the employee who all other employees of the unit ultimately report. The Fiscal Officer is the default submitter/delegating official for the reports located within the applicable Department Gateway applications.
- Please Note: An independent contractor (i.e., an outside CPA/consulting firm/consultant that the unit has hired) would not be considered the Fiscal Officer of the unit.
- For special district units who do not have any actual employees, the Department considers
  the President of the Governing Board to be the default submitter/delegating official for the
  reports located within the applicable Department Gateway applications.



# Fiscal Officer for Department Gateway Applications

- Please Note: The Fiscal Officer is the employee of the unit who all other employees of the unit ultimately report.
- This is not necessarily referring to the employee of the unit who will be the
  primary person to enter data into the Department Gateway applications. It is
  possible that the Fiscal Officer may not be the employee who enters in the
  majority of the data into Gateway for the unit.
- If the unit only has one employee, then by default, they are the Fiscal Officer.
- It is possible that the "DLGF Fiscal Officer" may be different than the SBOA Fiscal Officer.



# Fiscal Officer for Department Gateway Applications

- It is the responsibility of the Fiscal Officer to personally log into Gateway under their specific Gateway username to "submit" any forms or reports located within the Department Gateway applications (with the exception of the Budgets/Additional Appropriation applications).
- If the unit is subject to binding review, then the Head of the Governing Body is the default submitter/delegating official for the Budgets/Additional Appropriation applications.



### **Previous LDA Process**

- Limited Delegation of Authority (LDA)
  - Provides submitters the ability to allow staff members to edit data on their behalf.
  - Unit or Application Specific.
- Forms were available on the Department Website.
  - These would be filled out manually and submitted to the Department.
  - The Department has discontinued this process.



# LDA Application

- The Department has launched a new online application for the LDA process.
- Now that the application is live, the Department is no longer accepting the papers forms. All new LDA applications must be submitted through the online site <a href="https://gatewaylda.ifionline.org">https://gatewaylda.ifionline.org</a>.
- LDA User Guide
- All existing Editor and Read Only access permissions will be removed in early June. A new online LDA submission will be required each year as the Department will reset permissions annually in June.

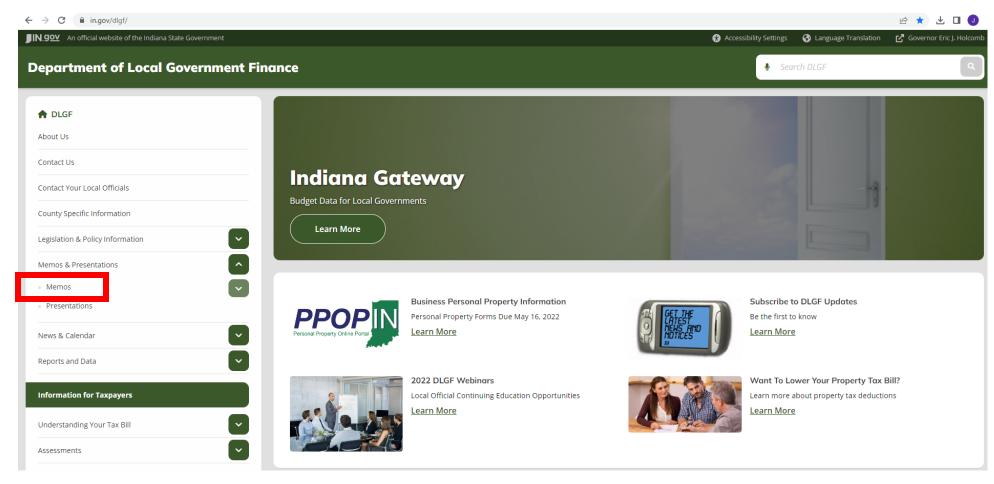


## Deadlines and the DLGF Website



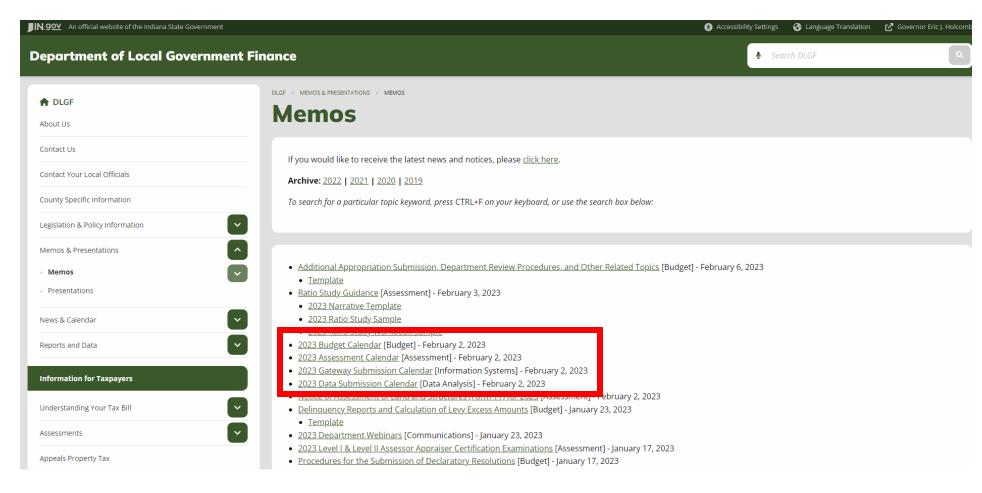


### Deadlines and the DLGF website





### Deadlines and the DLGF website





- Gateway applications that all unit types are required to submit:
  - Debt Management
  - Economic Development Reporting (EDR)
  - File Transmission

Department of Local Government Finance (DLGF)	Deadline
Additional Appropriations	Details
Abstract	Details
Assessor Reports	Jan 15
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



- Gateway applications that only city/town/county units are required to submit:
  - TIF Management

Department of Local Government Finance (DLGF)	Deadline
Additional Appropriations	Details
Abstract	Details
Assessor Reports	Jan 15
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



- Gateway applications that only county units are required to submit:
  - Data Entry for CNAV and Form
     22 (DECAF) (Auditor Only)
  - Abstract (Auditor Only)
  - PTABOA (Assessor Only)

Department of Local Government Finance (DLGF)	Deadline
Additional Appropriations	Details
Abstract	Details
Assessor Reports	Jan 15
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



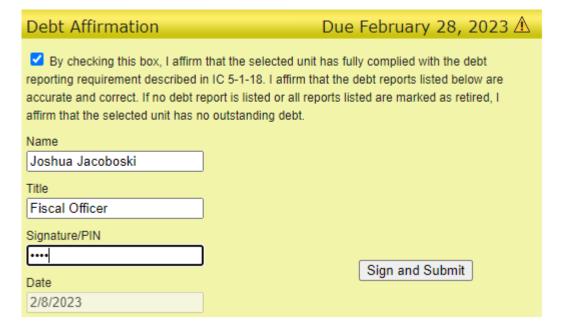
- Gateway applications that only Solid Waste Management Districts(SWMDs) are required to submit:
  - SB 131 Reporting for SWMDs

Department of Local Government Finance (DLGF)	Deadline
Additional Appropriations	Details
Abstract	Details
Assessor Reports	Jan 15
Budgets	Details
Data Entry for CNAV and Form 22	Details
Debt Management	Details
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File Transmission	Details
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### **Affirmations**

 Throughout Gateway there will be multiple instances of affirming the information that has been entered. When that is required, the 4-digit PIN that the submitter received when setting up the Gateway account will be needed.





# **Affirmations**

 Once that has been entered correctly, the box should turn green.





sustainable support from the State of Indiana.

the State Auditor.

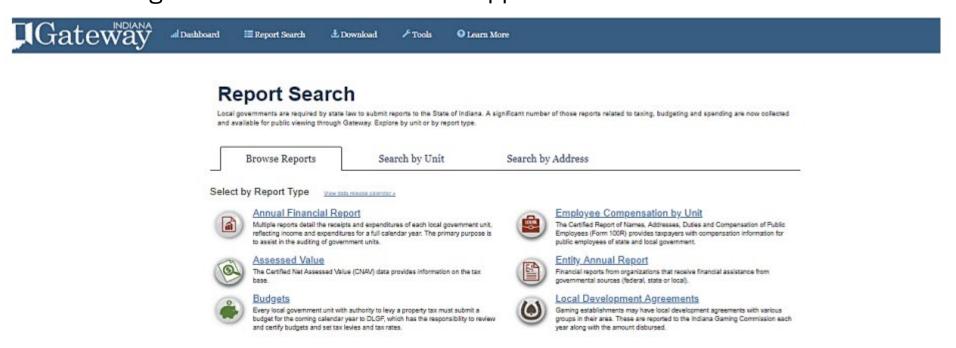


Participating state agencies currently include the Department of Local Government Finance, the State Board of Accounts, the Indiana Education Employment Relations Board, the Indiana Gaming Commission and

for Indiana



- The Gateway Public Reporting Site offers a variety of reports to the general public; you do
  not need a Gateway account to access this read-only information.
- Information contained in these reports comes from the data that has been submitted by the local units of government via the different applications.



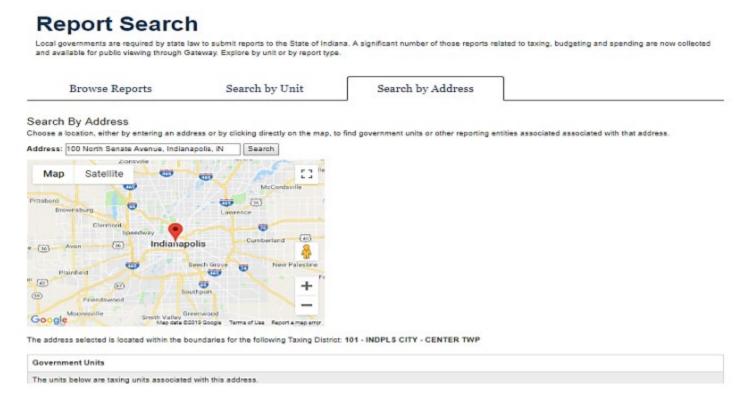


• Members of the public can also do a search for a particular local unit of government and see what applicable Gateway reports are associated with that unit.

Report Search	1	
Local governments are required by state la and available for public viewing through Ga	-	liana. A significant number of those reports related to taxing, budgeting and spending are now collected pe.
Browse Reports	Search by Unit	Search by Address
Search By Unit Start typing the name of a governmental unit.	When the desired unit appears in the	autocomplete list below the textbox, select the unit.
Type in the name of a reporting	unit:	
	Abo	out Gateway - Contact Us



 Members of the public can also enter a particular address to see what local units of government are associated with that address. They can then access those reports that are associated with those particular units.





# Questions?



# **Gateway Glossary & Help Pages**

- https://gateway.ifionline.org/public/glossary.aspx
- https://gateway.ifionline.org/public/help.aspx



### **Contact Information**

- Josh Jacoboski
  - Telephone: 317-234-8274
  - Email: jjacoboski@dlgf.in.gov
- Website: <a href="www.in.gov/dlgf">www.in.gov/dlgf</a>
  - "Contact Us" <a href="https://www.in.gov/dlgf/contact-us/">https://www.in.gov/dlgf/contact-us/</a>