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Gateway User Guide

Form 2 Estimate of Miscellaneous Revenues



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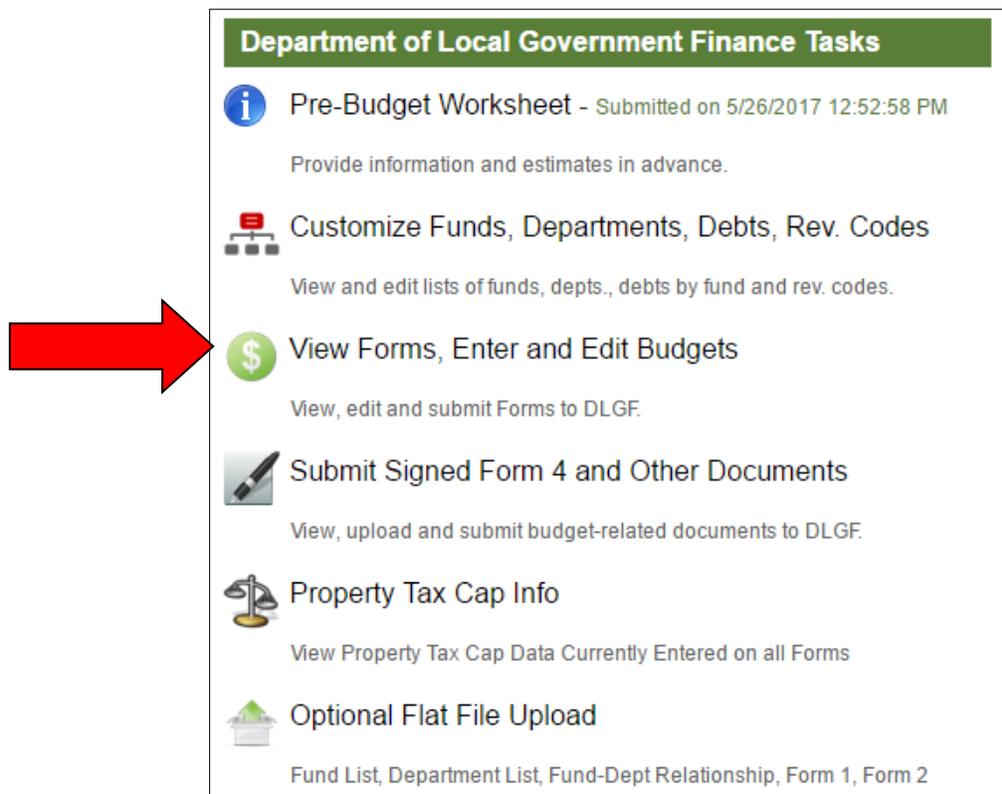
Form 2 Overview

Form 2 collects estimated revenue from sources, and will include all revenues *except property tax*. The form divides revenue into the amount expected to be collected between July 1st and December 31st of the current year, and the amount expected to be collected between January 1st and December 31st of the budgeted year. You must complete a Form 2 for every fund you have.

For additional assistance in adding funds to your unit, please see the [Adding, Deleting, and Connecting Funds and Departments User Guide](#).

Accessing Form 2

After logging into Gateway, and selecting “Budgets”, navigate to the Unit Main Menu by selecting the unit, and then click “View Forms, Enter and Edit Budgets.”



Department of Local Government Finance Tasks

-  **Pre-Budget Worksheet** - Submitted on 5/26/2017 12:52:58 PM
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



You will now be in the Budget Form Menu, where you can access all of your necessary budget forms. From the Budget Form Menu, select “Form 2: Estimate of Miscellaneous Revenues”, and notice the menu expand beneath Form 2. Then click on the paper and pencil icon on the left side of the Form 2 box that says “Click to edit form.”

The screenshot shows a vertical list of budget forms in a yellow-themed interface. The forms listed are: 'Current Year Financial Worksheet: Additional Calculations for Form 4B', 'Debt Worksheet', 'Form 1: Budget Estimate', 'Form 2: Estimate of Miscellaneous Revenues', 'Form 3: Notice to Taxpayers', 'Form 4: Ordinance for Appropriations and Tax Rates', and 'Form 4A: Budget Report'. Each form has a warning icon on the right. Below the 'Form 2' entry, a sub-menu is expanded, showing a button with a pencil icon labeled 'Click to edit form' and a warning icon with the text 'Not 'Ready to Submit''. A large red arrow points from the left towards the 'Click to edit form' button.

Navigation in the form, and verifying funds and revenues

Form 2 is navigated into each fund through a drop down menu that will allow users to select from their established funds. Remember that you must fill out a Form 2 for every fund you have. If you do not see all of your funds here that you are budgeting, please refer to the *Adding, Deleting, and Connecting Funds and Departments* user guide for assistance in adding them in.

The screenshot shows a dropdown menu titled 'Select Fund:'. The menu is open, displaying a list of fund options: '0101 - GENERAL', '0840 - TOWNSHIP ASSISTANCE', '1111 - FIRE', '1181 - FIRE BUILDING DEBT', and '1303 - PARK'. The '0101 - GENERAL' option is highlighted in blue. A large red arrow points from the right towards the highlighted option.

Your receipt/revenue codes will carry over to the current year’s Form 2. If you notice a revenue code that was not carried over, or a new one that will be needed for this budget cycle, it will need to be added before proceeding.

For your convenience, a list of revenue codes is available at the following link: [DLGF Receipt Codes](#)

Select Fund:

Select Category Tab

		Taxes And Intergovernmental	Licenses And Permits	Charges For Services	Fines, Forfeitures, And Fees	Other Receipts
Revenue Code	Description	July 1 to Dec 31, 2017		Jan 1 to Dec 31, 2018		
R112	Financial Institution Tax Distribution	\$	<input type="text"/>	\$	<input type="text"/>	
R114	Vehicle/Aircraft Excise Tax Distribution	\$	<input type="text"/>	\$	<input type="text"/>	
R135	Commercial Vehicle Excise Tax Distribution (CVET)	\$	<input type="text"/>	\$	<input type="text"/>	
TOTALS BY CATEGORY				Total: \$ 0	Total: \$ 0	
TOTALS BY FUND				Total: \$ 0	Total: \$ 0	
TOTALS BY UNIT				Total: \$ 0	Total: \$ 0	



Adding a Revenue Code

If you see that you have all revenues set up as needed, you may skip ahead to the “Entering Data on the Form 2” section on page 10 of this guide.

If you need to add and/or delete revenue codes, it can be done under the “Customize Revenue Codes List” page. To access this page, first use the bread crumbs at the top of the page to return to the Main Menu by clicking “Unit Main Menu”.

[Select Unit](#) > [Unit Main Menu](#) > [Budget Form Menu](#) > **Form 2**





Once on the Main Menu, select “Customize Funds, Departments, Debts, Rev. Codes”.



Department of Local Government Finance Tasks

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View and edit lists of funds, depts., debts by fund and rev. codes.
-  **View Forms, Enter and Edit Budgets**
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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

Next, select the “Customize Revenue Codes List.”

Customize Funds and Department Lists

-  **Customize Funds List**
-  **Customize Departments List**
-  **Customize Departments by Fund List**
View and cross-index departments by selected fund.



-  **Customize Revenue Codes List**
Select revenue codes for use within this unit's Form 2.
-  **Customize Debts by Fund List**
View and cross-index debts by selected fund.

The “Customize Revenue Codes Lists to Funds” page can be used to add any revenue codes that either did not automatically rollover into the current Budget forms, or for any new revenue.

Customize Revenue Codes Lists to Funds

Taxes And Intergovernmental
Licenses And Permits
Charges For Services
Fines, Forfeitures, And Fees
Other Receipts

+ ADD REVENUE CODE TO SELECTED CATEGORY

Delete	Specify Funds	Revenue Code and Description	Funds Receiving Revenue
		R112 - Financial Institution Tax Distribution	0101 - GENERAL 0840 - TOWNSHIP ASSISTANCE
		R114 - Vehicle/Aircraft Excise Tax Distribution	0101 - GENERAL 0840 - TOWNSHIP ASSISTANCE
		R135 - Commercial Vehicle Excise Tax Distribution (CVET)	0101 - GENERAL 0840 - TOWNSHIP ASSISTANCE

To begin, if you need to verify which revenue code to use, you may reference this listing: [SBOA Receipt Codes](#)

To add a revenue, first select the appropriate revenue category by clicking on the corresponding blue tab at the top of the page.

Customize Revenue Codes Lists to Funds

Taxes And Intergovernmental
Licenses And Permits
Charges For Services
Fines, Forfeitures, And Fees
Other Receipts

+ ADD REVENUE CODE TO SELECTED CATEGORY

Once the desired category is selected, click on the “+ Add Revenue Code to Selected Category.”



From here there is the option of adding a revenue code from the selected category. There will be a box pop up as shown below.

Add Revenue Code to Selected Category Tab

1. Select Revenue Code from list:

R406 - Street Maintenance and Other Transportation Fees ▼

2. Associate the selected Revenue Code with available funds:

Check/Uncheck All

- 0101 - GENERAL
- 0840 - TOWNSHIP ASSISTANCE
- 1111 - FIRE
- 1181 - FIRE BUILDING DEBT
- 4202 - PARK

Cancel Update Record

Click the drop down arrow next to “1. Select Revenue Code from list”. This brings up a menu of all of the revenue codes associated with the specific unit type and previously selected category. First you will need to scroll through to locate the revenue code that you wish to add. Now simply click on the desired revenue.

Add Revenue Code to Selected Category Tab

1. Select Revenue Code from list:

- R406 - Street Maintenance and Other Transportation Fees ▼
- R406 - Street Maintenance and Other Transportation Fees
- R407 - 911 Telephone Service
- R408 - Emergency Medical Services Fees**
- R409 - Document and Copy Fees
- R410 - Fire Protection Contracts and Service Fees
- R411 - Park and Recreation Receipts
- R412 - Parking Receipts
- R413 - Rental of Property
- R414 - Federal, State, and Local Reimbursement for Services
- R416 - Garbage/Trash Collection and Landfill Charges
- R417 - Airport Receipts
- R418 - Cemetery Receipts
- R419 - Storm Water Fees
- R420 - Sewage Fees
- R423 - Other Charges for Services, Sales, and Fees
- R425 - Police Protection Contracts and Service Fees

Cancel Update Record

Next, it must be associated with one or more of the available funds. You may now check next to the fund(s) in which this particular revenue will be associated with. Last you will click “Update Record” to add the revenue. You will repeat this process for each revenue being added.

Add Revenue Code to Selected Category Tab

1. Select Revenue Code from list:

R408 - Emergency Medical Services Fees ▼

2. Associate the selected Revenue Code with available funds:

Check/Uncheck All

0101 - GENERAL

0840 - TOWNSHIP ASSISTANCE

1111 - FIRE

1181 - FIRE BUILDING DEBT

1303 - PARK

Notice below the revenue code was added successfully. The blue box to the right shows which funds are receiving money from the revenue.

Customize Revenue Codes Lists to Funds

Taxes And Intergovernmental	Licenses And Permits	Charges For Services	Fines, Forfeitures, And Fees	Other Receipts
+ ADD REVENUE CODE TO SELECTED CATEGORY				
Delete	Specify Funds	Revenue Code and Description	Funds Receiving Revenue	
✘	✍	R408 - Emergency Medical Services Fees	1111 - FIRE	
✘	✍	R410 - Fire Protection Contracts and Service Fees	1111 - FIRE	
✘	✍	R411 - Park and Recreation Receipts	1303 - PARK	



Deleting a Revenue Code

If you need to totally delete an existing revenue code, select the red "X" on the far left of the page next to the revenue code you wish to delete.

Customize Revenue Codes Lists to Funds

	Taxes And Intergovernmental	Licenses And Permits	Charges For Services	Fines, Forfeitures, And Fees	Other Receipts
+ ADD REVENUE CODE TO SELECTED CATEGORY					
Delete	Specify Funds	Revenue Code and Description	Funds Receiving Revenue		
		R110 - Casino/Riverboat Distribution	0101 - GENERAL		
		R112 - Financial Institution Tax Distribution	0101 - GENERAL 0840 - TOWNSHIP ASSISTANCE		
		R114 - Vehicle/Aircraft Excise Tax Distribution	0101 - GENERAL 0840 - TOWNSHIP ASSISTANCE		
		R135 - Commercial Vehicle Excise Tax Distribution (CVET)	0101 - GENERAL 0840 - TOWNSHIP ASSISTANCE		



After clicking on the delete button, a window will appear warning that any amounts entered in the Form 2 will be deleted. Select "Confirm Delete" to continue. Doing so will delete a single revenue code.

Delete All Revenue Code Line Items

Are you sure you want to delete all of the line items for the following revenue code?

R110 - Casino/Riverboat Distribution

Data entered on Form 2 may be lost.



If you wish to either take out or add in a revenue to a fund, click the pencil and paper icon under “Specify Funds”.

		Taxes And Intergovernmental	Licenses And Permits	Charges For Services	Fines, Forfeitures, And Fees	Other Receipts
+ ADD REVENUE CODE TO SELECTED CATEGORY						
Delete	Specify Funds	Revenue Code and Description			Funds Receiving Revenue	
		R409 - Document and Copy Fees			0101 - GENERAL 0124 - 2015 REASSESSMENT	
		R410 - Fire Protection Contracts and Service Fees			1111 - FIRE	
		R411 - Park and Recreation Receipts			1303 - PARK	
		R414 - Federal, State, and Local Reimbursement for Services			0702 - HIGHWAY 1303 - PARK	

Next, you may uncheck the funds which you do not want the revenue going into, and/or check the funds which you do want the revenue associated with.

Customize Revenue Code Fund List

Selected Unit: 9985 Dlgf City 3, Gateway1 Co.
 Selected Year: 2018
 Selected Revenue Code: R409 - Document and Copy Fees

Available Funds:

Check/Uncheck All

- 0801 - HEALTH
- 1111 - FIRE
- 1182 - FIRE EQUIPMENT DEBT
- 1220 - LIBRARY CAPITAL PROJECTS
- 1303 - PARK
- 1310 - PARK NONREVERTING - CAPITAL
- 1390 - CUMULATIVE PARK & RECREATION
- 2204 - CUMULATIVE CAPITAL DEVELOPMENT

When you are finished, click “Update Record” to save your changes.



The Different Parts of the Form 2

Here is some information about what is contained in the Form 2. Revenues are organized into separate categories in which they are assigned by SBOA.

For each revenue, Form 2 collects five pieces of information:

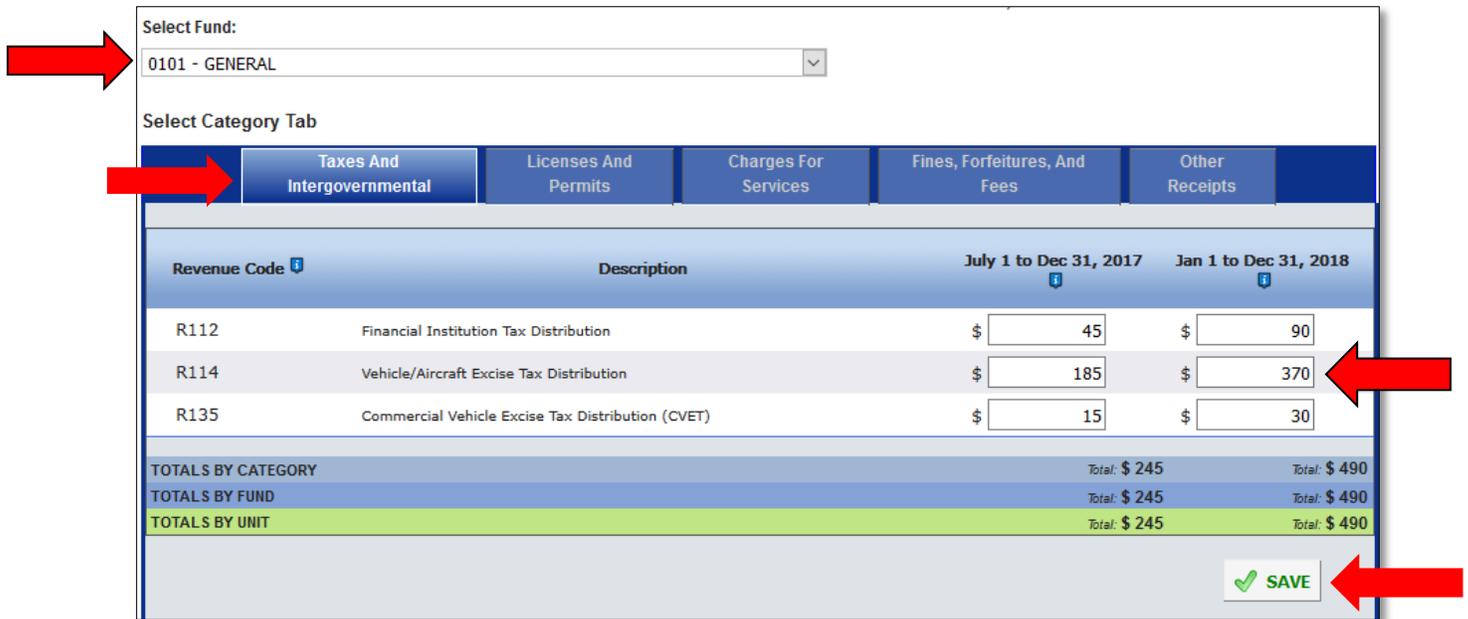
- (1) Revenue Category
- (2) Revenue Code
- (3) Description
- (4) July 1st to December 31st of 2017 amounts
- (5) January 1st to December 31st of 2018 amounts.

1	Taxes And Intergovernmental	Licenses And Permits	Charges For Services	Fines, Forfeitures, And Fees	Other Receipts
Revenue Code	Description			July 1 to Dec 31, 2017	Jan 1 to Dec 31, 2018
2	3			4	5

1. The **Revenue Category** field simply organizes revenues into five separate categories, or three separate categories for schools. These are selected by the blue tabs at the top of the form.
2. The **Revenue Code** is a number used to identify the type of revenue. This comes from a list provided by the Department.
3. The **Description** field will be populated when a revenue is added. This is a pre-populated description of the revenue code entered.
4. The **July 1 to December 31, 2017** amounts are the amounts expected to be received in the second half of the calendar year before the upcoming budget year.
5. The **January 1 to December 31, 2018** amounts are the amounts expected to be received in the upcoming budget year.

Entering Amounts on an Existing Revenue Code

Entering amounts on an existing revenue code is simple. First, select the fund, desired category tab, type in the estimates into the respective time period for each revenue type, and click the “Save” button at the bottom right-hand side of the page.

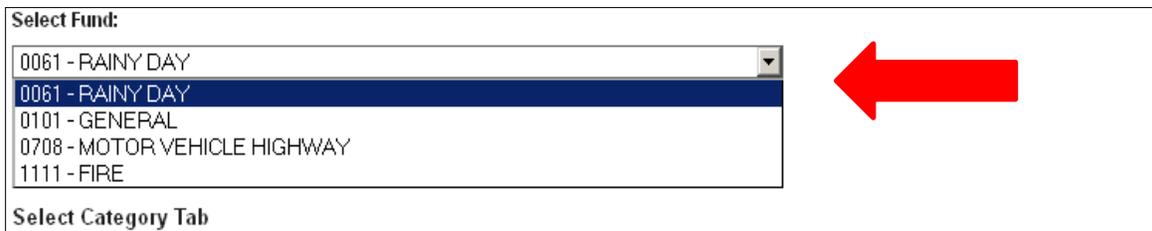


Select Fund: 0101 - GENERAL

Select Category Tab: Taxes And Intergovernmental

Revenue Code	Description	July 1 to Dec 31, 2017	Jan 1 to Dec 31, 2018
R112	Financial Institution Tax Distribution	\$ 45	\$ 90
R114	Vehicle/Aircraft Excise Tax Distribution	\$ 185	\$ 370
R135	Commercial Vehicle Excise Tax Distribution (CVET)	\$ 15	\$ 30
TOTALS BY CATEGORY		Total: \$ 245	Total: \$ 490
TOTALS BY FUND		Total: \$ 245	Total: \$ 490
TOTALS BY UNIT		Total: \$ 245	Total: \$ 490

Once you have completed entering amounts for the first fund, change the fund to your next fund by using the drop down box at the top of the page.



Select Fund:

- 0061 - RAINY DAY
- 0061 - RAINY DAY
- 0101 - GENERAL
- 0708 - MOTOR VEHICLE HIGHWAY
- 1111 - FIRE

Select Category Tab

Continue this process until you have entered all estimates for each fund.

Remember, you must complete a Form 2 for every fund.

Signing the Form Electronically

After you enter all of your revenue estimates, you may continue on to sign the form. At the bottom of Form 2, 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
 ⓘ

DATE



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 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 DLGF 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 select "Sign and Date Form", today's date will automatically populate the date field.

Form Signature

NAME

TITLE

SIGNATURE/PIN
 ⓘ

DATE

Form signature values saved at 01:48 PM and 50 seconds.



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.

Once you see the red text stating "Form signature values saved," you have successfully signed Form 2.



Marking the Form “Ready to Submit”

At the bottom of Form 2 there is a “Ready to Submit” status box. Before the form is complete there is 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 the box states: *“You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'July 1 to Dec. 31, 2017' and 'Jan. 1 to Dec. 31, 2018' 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 'July 1 to Dec 31, 2017' and 'Jan 1 to Dec 31, 2018' columns and the form has been signed with a valid four-digit PIN.

Once information has been entered in the “July 1 to December 31, 2017” and “January 1 to December 31, 2018” columns for each revenue, and you have signed the form with your name, title and 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 revenues for each fund 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 box will turn green and the form will now be marked as Ready to Submit. Form 2 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.



Submitting the Form 2

Note that after Form 2 has been marked as Ready to Submit, Form 2 under the Budget Form Menu now shows a green submit option.



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



Form 2: Estimate of Miscellaneous Revenues

Click to edit form

Click to submit completed form to DLGF

If Form 2 is complete and you have adopted your budget, click on the green “Click to submit completed form to DLGF” button.

A pop-up box appears asking if you are sure you want to submit this form. If you haven’t cleared off any errors, please take care of those first. If you are ready to submit, simply press “OK.”

Please check the [Error Prevention Report](#) for any errors before submitting this form.

Are you sure you want to submit this form?

Cancel OK

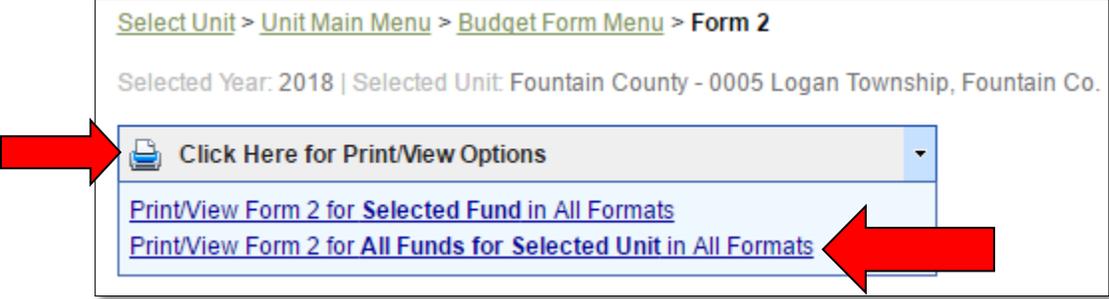
As noted below, Form 2 on the Budget Form Menu will now appear green and will now only have the option to view the form as “read only.”



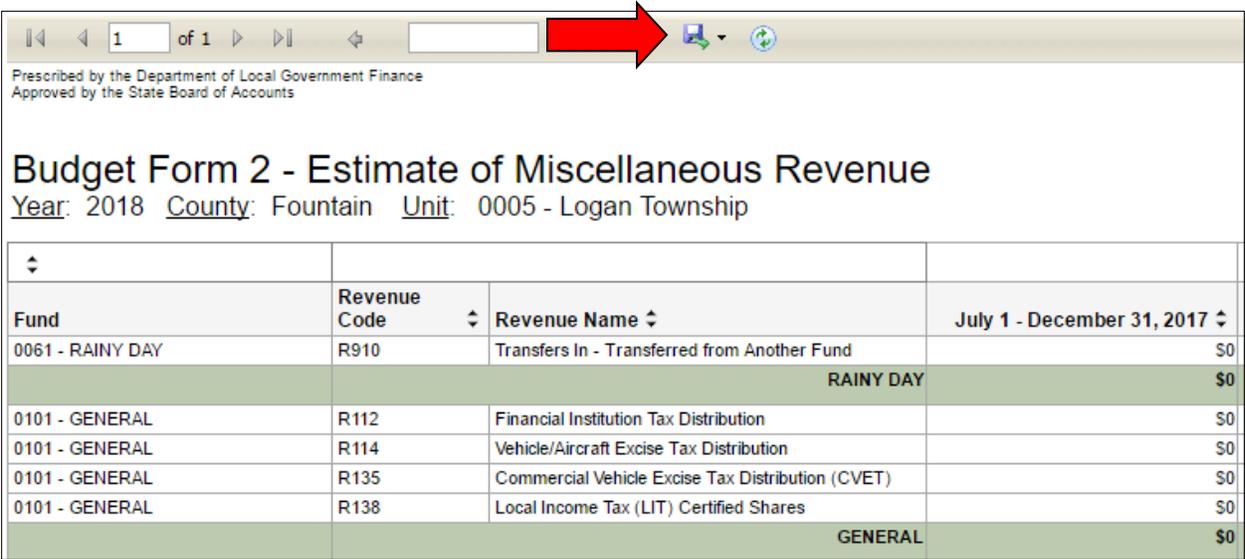
A form may no longer be edited once it has been submitted. If a form has been submitted by mistake, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.

Viewing and Printing the Form

At any point, Form 2 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 has the option to print the currently selected funds or all funds. Please select one.



Once the page appears in a new window, click on the save icon in the middle of the top of the page to view the export options.



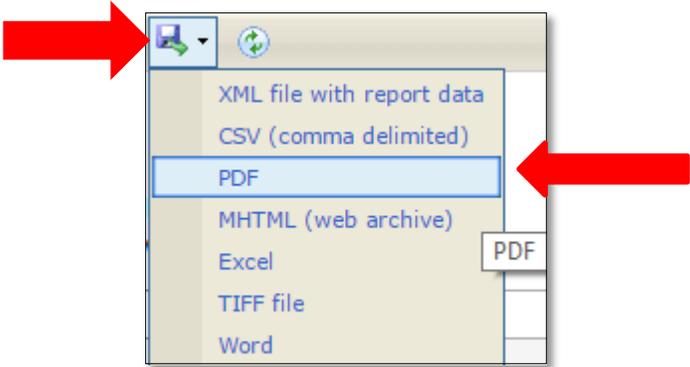
Prescribed by the Department of Local Government Finance
Approved by the State Board of Accounts

Budget Form 2 - Estimate of Miscellaneous Revenue

Year: 2018 County: Fountain Unit: 0005 - Logan Township

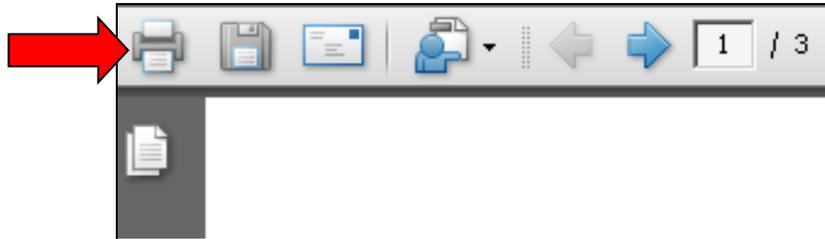
Fund	Revenue Code	Revenue Name	July 1 - December 31, 2017
0061 - RAINY DAY	R910	Transfers In - Transferred from Another Fund	\$0
RAINY DAY			\$0
0101 - GENERAL	R112	Financial Institution Tax Distribution	\$0
0101 - GENERAL	R114	Vehicle/Aircraft Excise Tax Distribution	\$0
0101 - GENERAL	R135	Commercial Vehicle Excise Tax Distribution (CVET)	\$0
0101 - GENERAL	R138	Local Income Tax (LIT) Certified Shares	\$0
GENERAL			\$0

From the list of export options, Form 2 may be exported into a PDF, Word, Excel, or many other different file types. This allows for personalization on how the data is displayed.





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



Congratulations! You have successfully submitted Form 2. 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.