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Gateway
User Guide

Form 3
Notice to Taxpayers

Updated June 2017
Table of Contents

Form 3 Overview........................................................................................................................................... 2
Accessing the Form 3 .................................................................................................................................... 3
Ensuring that Form 3 is Generated Correctly ............................................................................................... 4
Entering Data on Form 3 ............................................................................................................................... 5
1st Section - Inserting the Hearing Information ............................................................................................ 6
2nd Section – Estimated Max Levies and Property Tax Cap Credit Estimates ............................................... 8
3rd Section - Budget and Levy Information ................................................................................................... 8
Pulling in Data from Other Forms ................................................................................................................. 9
Manual Data Entry ...................................................................................................................................... 10
Marking the Form “Ready to Submit” ........................................................................................................ 10
Viewing and Printing the Form 3 ................................................................................................................ 11
Submitting Form 3 ...................................................................................................................................... 12
Form 3 Overview

Form 3 - Notice to Taxpayers is used as the template for advertising your proposed budget information, as required by law. Form 3 contains three sections of information. First, it informs taxpayers of the time, date, and location of your public hearing and adoption meeting. Second, it lists out the Department provided Estimated Max Levy by levy type, and Property Tax Cap Credit Estimate. (These come pre-populated by the Department.) Third, it presents a summary of the proposed budget and levy, a comparison against last year’s levy, and any excess levy appeals as projected by the unit. All of this information is presented individually by fund.

The Form 3 must be submitted electronically through Gateway to fulfil your budget advertising requirements. (Schools still have additional advertising requirements.) IC 6-1.1-17-3 requires online advertisement of the Notice to Taxpayers to be submitted at least 10 calendar days before the public hearing. Online advertisement will only be completed by submitting the Form 3 from the Budget Form Menu in the Budget application of Gateway. Once submitted, notices will be available online at www.budgetnotices.in.gov or by calling (888) 739-9826.

If your unit has its own website, according to Indiana’s notice requirements you must also supply your Notice to Taxpayers here. (Indiana’s Public Access Counselor can verify what your unit’s requirements are.) Our Department can provide a link for you to display on your page. Send your email request for the link to our Communications Director, Jenny Banks, at jbanks@dlgf.in.gov.
Accessing the Form 3

First, navigate to the Budget Form Menu by selecting your unit and then clicking “View Forms, Enter and Edit Budgets.”

Next, click on Form 3, and then select the “Click to edit form” link. This will load the form. Please be aware it may take a few seconds to load.
Ensuring that Form 3 is Generated Correctly

Similarly to other forms that have an option to fill from other forms, Form 3 can pull certain information for DLGF reviewed funds from Form 4B’s advertised column. Therefore, before submitting Form 3, it is very important that Form 1, Form 4A, and Form 4B advertised columns have been entered into Gateway for every fund. The adopted columns do not need to be completed prior to generating Form 3.
Entering Data on Form 3

There are 3 sections to the Form 3. The first section (hearing and adoption info) of Form 3 is completed by means of a pop-up box. The second section (estimated max levies and property tax cap credit estimate) is pre-populated by the Department. The third section (budget information) can be pulled in with a click of a button. The Current Tax Levy (column 5) will pre-populate.

![Form 3 Example](image-url)
1st Section - Inserting the Hearing Information

The paragraph at the top of Form 3 will first show incomplete fields as red text. To populate these lines, click the button that says “Fill in Hearing Info.”

This will bring up a pop-up box from which you will enter your unit’s information. Be sure to enter complete addresses including town. On your meeting dates, remember that unless you are a consolidated (1st class) or 2nd class city, they must be a minimum of 10 days apart. There is also a checkbox to indicate whether a unit’s territorial boundaries have changed since the prior year’s budget.
Once you have entered all the fields in the pop-up box, click “Update Record.” This will enter the information into the paragraph. If you need to change any of the information, click “Fill in Hearing Info” again and change the necessary fields. Click “Update Record” and the changes will be made in the paragraph and the top of the budget chart.
2nd Section – Estimated Max Levies and Property Tax Cap Credit Estimates

All of the information in this section will be filled in by the Department. These figures are based on our calculations, and will be populated in this form before your Budget Workshop with your DLGF Budget Field Representative. **You do not have the capability to alter the information in this section.**

<table>
<thead>
<tr>
<th>Estimated Civil Max Levy</th>
<th>$288,199</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Fire Max Levy</td>
<td>[Estimated Fire Max Levy has not been populated by the Department’s Max Levy Calculations. Please contact <a href="mailto:gateway@dlgf.in.gov">gateway@dlgf.in.gov</a> for more information.]</td>
</tr>
<tr>
<td>Est. Fire Territory Max Levy</td>
<td>[Estimated Fire Territory Max Levy has not been populated by the Department’s Max Levy Calculations. Please contact <a href="mailto:gateway@dlgf.in.gov">gateway@dlgf.in.gov</a> for more information.]</td>
</tr>
<tr>
<td>Est. Transportation Max Levy</td>
<td>[Estimated Transportation Max Levy has not been populated by the Department’s Max Levy Calculations. Please contact <a href="mailto:gateway@dlgf.in.gov">gateway@dlgf.in.gov</a> for more information.]</td>
</tr>
<tr>
<td>Est. Bus Replacement Max Levy</td>
<td>[Estimated Bus Replacement Max Levy has not been populated by the Department’s Max Levy Calculations. Please contact <a href="mailto:gateway@dlgf.in.gov">gateway@dlgf.in.gov</a> for more information.]</td>
</tr>
<tr>
<td>Property Tax Cap Credit Estimate</td>
<td>$11,520</td>
</tr>
</tbody>
</table>

3rd Section - Budget and Levy Information

The third section of the Notice to Taxpayers consists of a table that displays a list of your budget estimates, levy requests, excess levy appeal requests, and current tax levy amounts for all funds. Please ensure that all necessary funds appear in this table. The list of funds in Column 1 is based upon the currently added funds. If any funds happen to be missing that you are going to budget next year, please add them under the Customize Unit by Funds List page. Additional assistance on adding a fund can be found in the Adding, Deleting, and Connecting Funds and Departments user guide.
Once you have verified the funds list, you may begin entering data in the table. The budget estimates in column 2 and the maximum estimated funds to be raised in column 3 can be pulled from other forms or entered manually. The excessive levy appeals in column 4 will need to be entered manually. The last column (current tax levy) is hard coded based on current year’s Budget Order and cannot be changed.

**Pulling in Data from Other Forms**

Before pulling data from the other forms, it is very important that Form 1, Form 4A, and Form 4B advertised columns have been entered into Gateway for every fund. The adopted columns do not need to be completed prior to generating Form 3. This will ensure that all of your forms match with the same information, and numbers are not transposed or forgotten. For assistance completing any of the previous forms, please see each specific User Guide.

In order to pull the amounts in from the other forms, simply click both grey boxes that read, “Click Here to Insert Form 4B advertised amounts.” This will pull data from Form 4B advertised column for all funds. Please check to ensure the correct amounts have pulled in.

If you have an excessive levy appeal, it will need to be manually entered in column 4. Please see the next section titled Manual Data Entry for further instructions.

The current tax levy in column 5 has been pre-populated from the previous year’s DLGF-certified budget order. You should verify that these values are correct before submitting the form for advertisement.
Manual Data Entry

Users also have the option to manually key in the amounts for each fund. To do so, simply click in the desired field and enter the amount. Column 4, the excessive levy appeals, must be manually entered. (Note: Please be sure that the amount you put in column 4 is included in column 3.) Once you have completed the table, please be sure to click “Save” on the bottom right-hand side.

![Table Example]

After you click save, the amounts will total and red text will display the time the form was saved.

Marking the Form “Ready to Submit”

At the bottom of Form 3 you will notice the Ready to Submit status box. Before you complete the form you will notice 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. Under a closer look, you will notice that the box states: “You will be able to mark this form as 'Ready to Submit' once all required fields have been completed.”

Once the required information has been entered, the yellow Ready to Submit option will appear. This gives users with submission and editing rights 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 fields have been completed.
Once this box is checked, the box will turn green and the form will now be marked as Ready to Submit. Form 3 will still be editable until it is submitted.

**Viewing and Printing the Form 3**

Printing the Form 3 is an important part of the budget process as it allows you to post your public hearing and adoption meeting information along with your budget estimates, levies, and other pertinent information. (Note: Please refer to the Indiana Public Access Counselor for Open Door Law requirements for your unit. More information can be found at [www.in.gov/pac](http://www.in.gov/pac).)

The Form 3 can only be printed after being marked as ready to submit. Once the Form 3 has been marked as ready to submit, you should notice the drop down menu on the top-left corner of the form that reads, “Click Here for Print/View Options.” If this area still reads, “Print options only available once Form 3 is marked ‘Ready to Submit’,” try saving or leaving the Form 3 and accessing it again. Click on the drop down menu that states, “Click Here for Print/View Options.” From here, you select the format option to continue.

Once you see the page appear 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 Notice to Taxpayers 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 the Notice to Taxpayers 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 Form 3 as a PDF.

Submitting Form 3

You need to submit your Form 3 once it is ready to be advertised. Once Form 3 has been marked as Ready to Submit, Form 3 under the Budget Form Menu now shows a green submit option. **Please remember that this form must be submitted a minimum of 10 calendar days prior to your Public Hearing. This is the only way to fulfil your advertising requirements.**

Once the Notice to Taxpayers is complete and will not need to make any changes, you will want to click on the green submit button.
You will notice a pop-up box asking you if you have checked your Error Prevention Report. If you are ready to submit this form, simply press OK.
As you will note below, Form 3 on the Budget Form Menu will now appear green and will now only have the option to view the form.

You may no longer edit a form once it is submitted. If you have submitted this form by mistake, or there are changes that must be made, please contact the DLGF at gateway@dlgf.in.gov or at 317-232-3777.

Congratulations! You have successfully submitted your Form 3: Notice to Taxpayers. Please see our other user guides for assistance with other forms. If you have any questions, please email the Gateway inbox at gateway@dlgf.in.gov.