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Gateway User Guide

Form 4A BUDGET REPORT



Table of Contents

Form 4A Overview	2
Accessing the Form 4A.....	2
Ensuring Proper Options are Available on the Form	3
Details of the Form 4A	4
Option 1: Completing the Form 4A by Pulling in Form 1 Values	5
Option 2: Completing the Form 4A Manually.....	6
Signing the Form Electronically.....	6
Marking the Form “Ready to Submit”	7
Viewing and Printing the Form	9



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

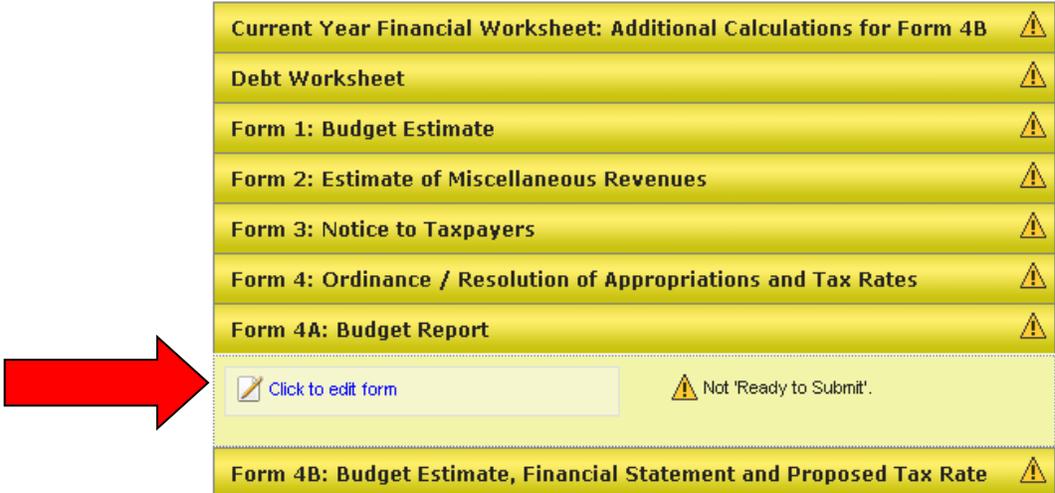
First, navigate to the Budget Form Menu by selecting the unit, and then click "View Forms, Enter and Edit Budgets."



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

From the Budget Form Menu, click on “Form 4A: Budget Report”. Next, click on the link on the left side of the Form 4A box that says, “Click to edit form”. This will load the form.



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 / Resolution of Appropriations and Tax Rates ⚠

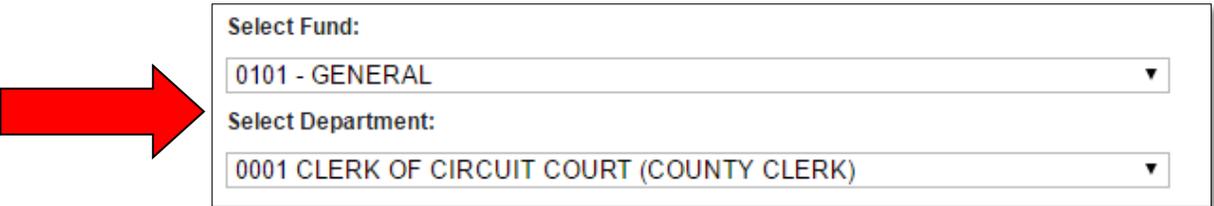
Form 4A: Budget Report ⚠

[Click to edit form](#) ⚠ Not 'Ready to Submit'.

Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate ⚠

Ensuring Proper Options are Available on the Form

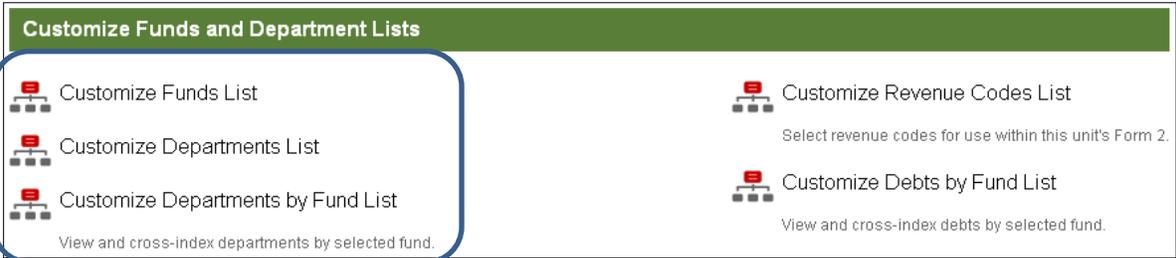
Form 4A is divided using drop-down menus. The first drop-down menu allows users to select a fund. Once a fund is selected, Gateway will populate a second drop-down menu from which to select the department. If you are departmentalized, they will appear here.



Select Fund:
0101 - GENERAL ▼

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

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*.



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.

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 your unit is not departmentalized, the department field should be “0000 No Department.”

Select Fund:

0101 - GENERAL ▼

Select Department:

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: 0000 NO DEPARTMENT				
	Advertised Amount		Adopted Amount	
PERSONAL SERVICES	\$	10,000	\$	8,000
SUPPLIES	\$	2,000	\$	2,000
OTHER SERVICES AND CHARGES	\$	3,000	\$	3,000
CAPITAL OUTLAY	\$	5,000	\$	2,500
DEBT SERVICE	\$	0	\$	0
PROPERTY TAX CAP	\$	575	\$	575
TOTAL	\$	20,575	\$	16,075



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.

Budget Report ⓘ

Select Fund:
0101 - GENERAL ▼

Select Department:
0000 NO DEPARTMENT ▼

 [Click to Insert All Unit Amounts From Form 1](#)

DEPARTMENT: 0000 NO DEPARTMENT

	Advertised Amount	Adopted Amount
PERSONAL SERVICES	\$ 10,000	\$ 8,000
SUPPLIES	\$ 2,000	\$ 2,000
OTHER SERVICES AND CHARGES	\$ 3,000	\$ 3,000
CAPITAL OUTLAY	\$ 5,000	\$ 2,500
DEBT SERVICE	\$ 0	\$ 0
PROPERTY TAX CAP	\$ 575	\$ 575
TOTAL	\$ 20,575	\$ 16,075



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.

Budget Report ⓘ

Select Fund:

[Click to Insert All Unit Amounts From Form 1](#)

Select Department:

DEPARTMENT: 0000 NO DEPARTMENT

	Advertised Amount	Adopted Amount
PERSONAL SERVICES	\$ 10,000	\$ 8,000

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
 ⓘ

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 name and title into the signature boxes. 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 Department at gateway@dlgf.in.gov or at (317) 232-3777 in the event that you have lost or not received a PIN code. Next click “Sign and Date Form”, and today’s date will automatically populate the date field.

Form Signature

NAME

TITLE

SIGNATURE/PIN
 

DATE

Form signature values saved at 01:39 PM and 56 seconds.



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.”*

 **Not Ready To Submit** 

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 advertised and adopted amounts columns are entered for all funds.

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 4A can still be edited 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 4A has been marked as "Ready to Submit", Form 4A under the Budget Form Menu now shows a green submit option.

Form 4A: Budget Report
Click to edit form
Click to submit completed form to DLGF
Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate

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."

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 4A on the Budget Form Menu will now appear green and will now only have the option to view in “read only” form.

Form 4A: Budget Report ✓

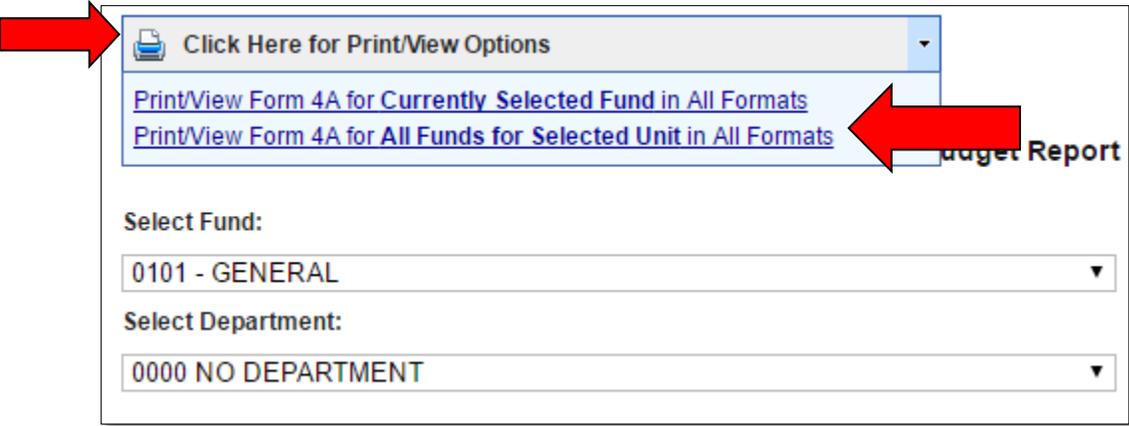
🔍 [Click to view form](#)
✓ This form has been submitted.

Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate ⚠

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 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 All Funds for Selected Unit in PDF Format.”



🖨 **Click Here for Print/View Options**

[Print/View Form 4A for Currently Selected Fund in All Formats](#)

[Print/View Form 4A for All Funds for Selected Unit in All Formats](#)

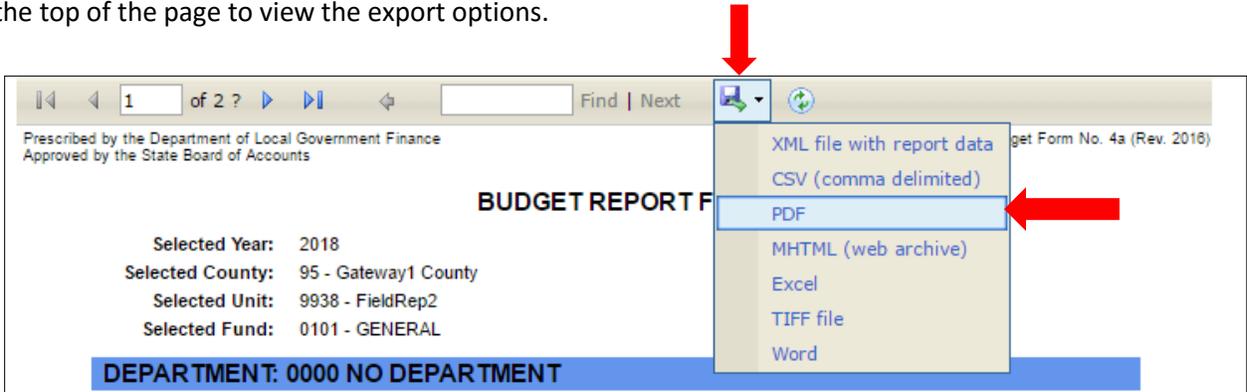
Select Fund:

0101 - GENERAL
▼

Select Department:

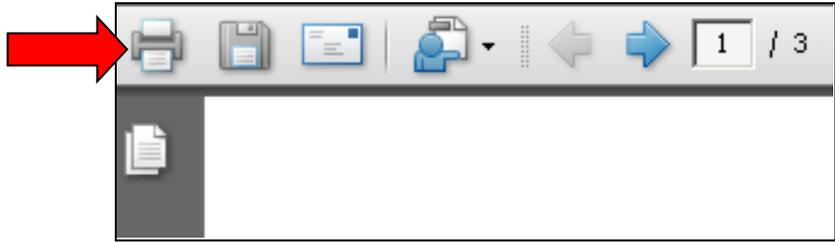
0000 NO DEPARTMENT
▼

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 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.