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Gateway User Guide

Submitting Completed Budget Forms



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Overview on Submitting Budget Forms

This user guide will assist with submitting forms when it is necessary. The only form that must be submitted before adoption is the Form 3, Notice to Taxpayers. All other forms will not be submitted until your unit has formally adopted your budget.

Once a form has been submitted, it can no longer be edited. This is the final step for most units in the Gateway Budget application. Submitting the forms is an essential step as it allows the Department to review and potentially certify a unit’s budget.

Deadlines

Not all forms are due on the same date. The Form 3: Notice to Taxpayers should be submitted a minimum of 10 days before the Public Hearing. Once the Form 3 is submitted, the Department will post the units’ Notice to Taxpayers online at www.budgetnotices.in.gov. Debt Worksheet only needs to be submitted if the unit is repaying a debt through a debt service fund. If your unit does not have a Debt Service fund, you do not need to submit this form.

With the exception of the Form 3, all other forms are to be submitted within 48 hours after adopting the budget.

Signing the Form Electronically

At the bottom of all the forms except Form 3 and Form 4, there is a box for placing an electronic signature on the form. Only the user with submission rights will see the signature box.

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. This PIN 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. Once you select “Sign and Date Form,” today’s date will automatically populate the date field.

Form Signature

NAME
JAR

TITLE
Trustee

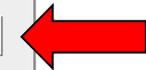
SIGNATURE/PIN
●●●●

DATE
06/02/2017

Form signature values saved at 09:58 AM and 20 seconds.

✔ 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.



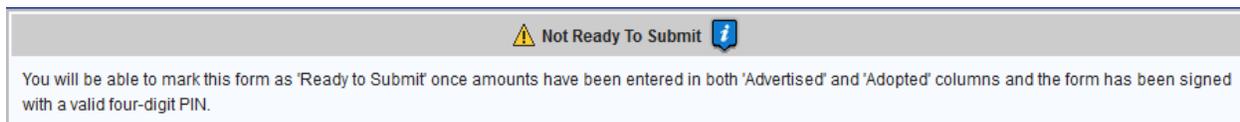


Once the red text appears stating “Form signature values saved”, the form is successfully signed. Each form will need to be signed individually prior to submitting.

Validation/Required Fields

Most forms in Gateway have some type of validation that must be satisfied before the form can be marked as “Ready to Submit”, and then be submitted. Due to the variety of units that submit budgets, validation can only check for very basic criteria. As a result, although the “Ready to Submit” option appears, it does not mean that the form is necessarily complete.

At the bottom of each form is the “Ready to Submit” status box. An example from Form 1 is shown below.



Each form’s “Ready to Submit” status box contains a list of all the validation that must be met in order to be able to submit the form. The Form 1 example above reads:

“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.”

In Form 1, Gateway will check to make sure that the form has been signed and at least one amount has been entered in both the advertised and adopted columns. It is possible to submit Form 1 with only a single line item as long as both amounts are entered. This is why is very important to review the forms individually for accuracy and completeness prior to submitting them.

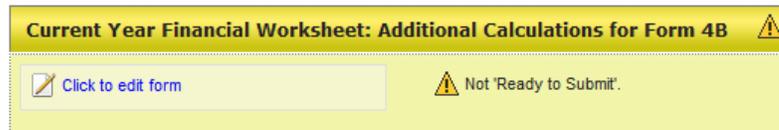
Each form has its own validation which can be reviewed by reading the “Not Ready to Submit” box at the bottom of the form. As long as the forms are complete, no issues should be encountered marking the form as “Ready to Submit.”



Error Prevention Report

The Error Prevention Report is designed to help users prevent basic commonly made mistakes. It is **highly recommended** that this report be run before advertising the Form 3, adopting, and submitting budget forms. Any error that appears should be reviewed to better ensure accuracy. The link to this report can be found on top of the Budget Form Menu.

Select from Available Forms



The potential errors in this report are divided into two categories: errors to review prior to advertising and errors to review after submitting Form 3. The determining factor on which errors appear is the submission status of Form 3. The Error Prevention Report will automatically generate upon opening the report. Please be sure to review these errors before advertising Form 3: Notice to Taxpayers, and later review the new list of errors after advertising.

Upon opening the report, a list of potential errors will populate the page below. The list will automatically update every time it is reopened. It is very important to note that **this report will not find all possible mistakes, but is designed to catch the most common ones.**

Error Prevention Report

Please take the time to address the following issues as they frequently indicate errors. Once an issue is corrected, it will be removed from the list. **This tool will not find all possible mistakes, but is designed to catch the most common ones.** For assistance resolving these issues, please contact the DLGF at gateway@dlgf.in.gov or 317-232-3777.

Some errors will appear if the forms are not yet complete.

Form / Error #	Error	Details	Funds Affected
F3 / 4	Form has not been submitted.	Form 3 has not been submitted. Submitting Form 3 posts your unit's public hearing and adoption meeting information to the Gateway public site at http://gateway.ifonline.org . Please submit form as soon as possible.	No Fund Detail
F4B / 22	Incomplete funds detected.	Please complete the advertised column on the following funds on the Form 4B.	9 fund(s) affected

This will list the errors as categorized by the form and number of errors, the error, a description of the error, and a link on the right in blue to show the funds that are affected by this error.

To view the list of affected funds, click the blue “# fund(s) affected” button.

Form / Error #	Error	Details	Funds Affected
F3 / 4	Form has not been submitted.	Form 3 has not been submitted. Submitting Form 3 posts your unit's public hearing and adoption meeting information to the Gateway public site at http://gateway.ifonline.org . Please submit form as soon as possible.	No Fund Detail
F4B / 22	Incomplete funds detected.	Please complete the advertised column on the following funds on the Form 4B.	3 fund(s) affected

Once the funds affected button has been selected, a list of the funds containing the error will appear.

Funds with Errors:

0061: RAINY DAY

1111: FIRE

0101: GENERAL

Some officials may find it useful to print out the errors. This page can be printed through the print option on the top, left-hand side of the page.

Selected Year: 2018
 Selected County: 11 - Clay County
 Selected Unit: Clay County


[Click Here for Print/View Options for entire unit](#)

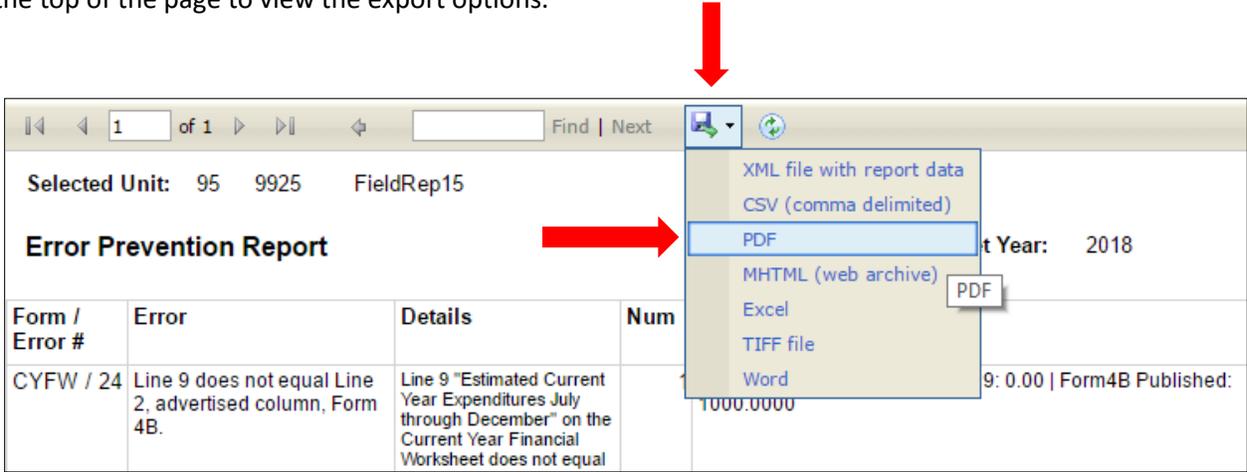
[Print/View Error Report for All Funds for Selected Unit in All Formats](#)

Error Prevention Report

Please take the time to address the following issues as they frequently indicate errors. Once an issue is corrected, it will be removed from the list. **This tool will not find all possible mistakes, but is designed to catch the most common ones.** For assistance resolving these issues, please contact the DLGF at gateway@dlgf.in.gov or 317-232-3777.

Some errors will appear if the forms are not yet complete.

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, the Error Prevention Report may be exported into a PDF, Word, Excel, or many other different file types. This allows users to personalize how they wish to have data displayed.

As errors are corrected they will be removed from the list the next time the report is accessed. Please remember that once Form 3 is submitted, Gateway will begin checking for additional errors once the report is accessed again.

Marking the Form “Ready to Submit”

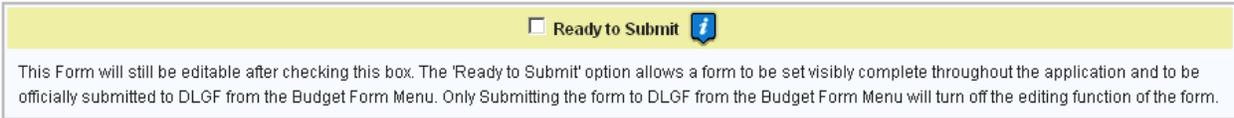
As previously mentioned, at the bottom of each form are the “Ready to Submit” status boxes. Before completing the form, a grey box will display that is titled “Not Ready to Submit.”

As in the past, 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 complete. Validation will help prevent some commonly found errors. Upon closer review, you will notice that each grey “Not Ready to Submit” box states the validation for each form.

 **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 all the listed validation has been completed, users will then have the ability to mark the form as ready to submit by clicking on the check box. Users with either submission or editing rights will be able to mark the form as “Ready to Submit.” Do not check this box until it is confirmed that the form is complete and correct. Validation can only check for certain basic things. Only you can confirm that the form truly is ready to submit.



Once this box is checked, the box will turn green and the form will now be marked as “Ready to Submit”. The form can still be edited until it is submitted.

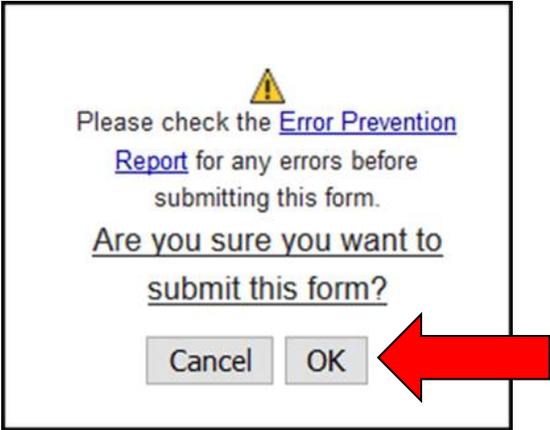


Submitting a Form

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



With the exception of the Form 3, after your unit has formally adopted the budget, click on the green “Submit” button. A pop-up box will appear asking if you are sure you want to submit this form. If you are sure simply press “OK”.



As depicted below, the form on the Budget Form Menu will now appear green and the only option available is to view the form.

Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate <input checked="" type="checkbox"/>
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 5px; text-decoration: none; color: #3f51b5;"> Click to view form </div> <div style="text-align: right;"> <input checked="" type="checkbox"/> This form has been submitted. </div> </div>

You will continue submitting your remaining forms, with the exception of Debt Worksheet if it is not applicable.

Current Year Financial Worksheet: Additional Calculations for Form 4B <input checked="" type="checkbox"/>
Debt Worksheet <input checked="" type="checkbox"/>
Form 1: Budget Estimate <input checked="" type="checkbox"/>
Form 2: Estimate of Miscellaneous Revenues <input checked="" type="checkbox"/>
Form 3: Notice to Taxpayers <input checked="" type="checkbox"/>
Form 4: Ordinance / Resolution of Appropriations and Tax Rates <input checked="" type="checkbox"/>
Form 4A: Budget Report <input checked="" type="checkbox"/>
Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate <input checked="" type="checkbox"/>
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px 5px; text-decoration: none; color: #3f51b5;"> Click to view form </div> <div style="text-align: right;"> <input checked="" type="checkbox"/> This form has been submitted. </div> </div>

You may no longer edit a form once it is submitted. If you have submitted a form by mistake please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.

Congratulations! If you have followed this process for all forms in the Form Menu, you have successfully submitted your budget forms. You will also need to scan and upload your Signed Form 4. Please see our other user guides for assistance with other portions of the budget. If you have any questions, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.