



Budget Cycle and Forms Overview

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Project Coordinator**



Gateway Budget Forms Process

- Customize Funds, Departments, Debts, Rev. Codes
 - Verify. Add/Remove items as needed.
- Current Year Financial Worksheet, Form 1, Form 2, Debt Worksheet.
- Form 4A: Click blue “Click to insert All Unit Amounts From Form 1” button.
- Form 4B: Click gray “Click Here to Insert Finan. Wksht, Debt Wksht, Form 2, & Form 4A advertised amounts/Adopted Amounts” to pull all into the form (lines 1-10). Lines 11-17 will be used to calculate the tax levy and rate.
 - Circuit Breaker: Line 1 of 4B = gross or increased budget.

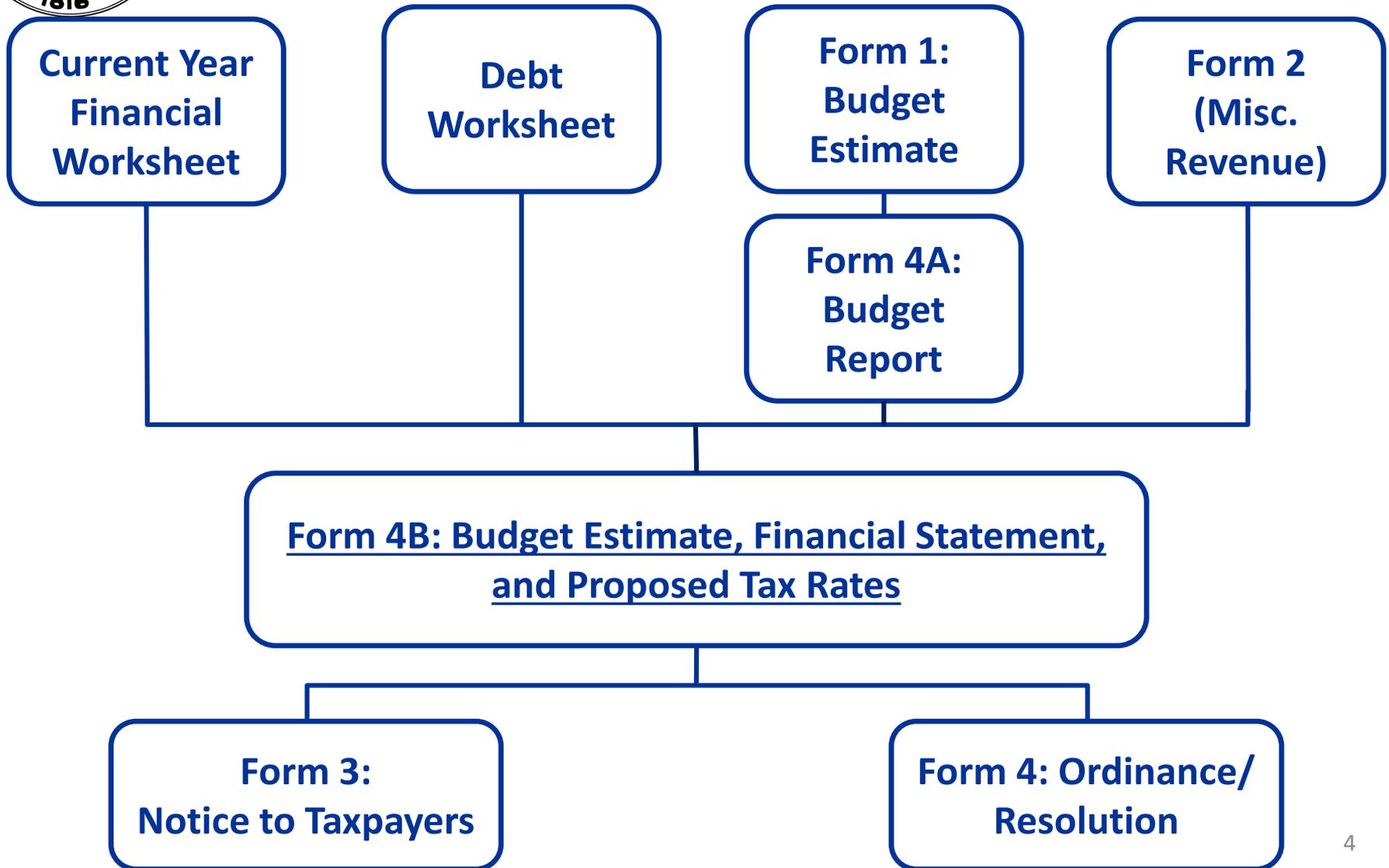


Gateway Budget Forms Process

- Form 3: Notice to Taxpayers and Submission (Net Budget)
- Form 4: Adoption Resolution/Ordinance (Net Budget)
- 1782 Notice Recipients – Review/Update
- Submit Budget Forms – Submit all remaining forms within 48 hours after adoption, DW might be exception.
- Upload Signed Form 4 – Within 48 hours after adoption.



Budget Forms – Flow Chart





Customize Funds, Departments, Debts, Rev. Codes

- Customize Funds, Departments, Debts, Rev. Codes.

[Select Unit](#) > [Unit Main Menu](#) > [Customize Unit](#)

Selected Year: 2018 | Selected Unit: Gateway1 County - 9910 Training City 1, Gateway1 Co.

Customize Funds/Depts./Rev.Codes/Debts Lists - Training City 1, Gateway1 Co.

Select from the options below to customize your unit's funds, departments, and/or index list of departments by fund.

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.



Customize Funds, Departments, Debts, Rev. Codes

- How to add a fund.

[Select Unit](#) > [Unit Main Menu](#) > [Customize Unit](#) > **Customize Funds**

Selected Year: 2018 | Selected Unit: Gateway1 County - 9910 Training City 1, Gateway1 Co.

Funds List - 9910 Training City 1, Gateway1 Co.

Click on a column header to sort column.

<u>Fund Code</u>	<u>Fund Name Link</u>	Remove Fund
0061	Rainy Day	X
0101	General	X
0180	Debt Service	X

Add a Fund

Add a New Home Ruled Fund



Customize Funds, Departments, Debts, Rev. Codes

- How to add a Department.

Select Unit > Unit Main Menu > Customize Unit > Customize Departments

Selected Year: 2018 | Selected Unit: Ga

Departments List f

Add a Department

Dept. Code and Name:

0001 -- CLERK OF CIRCUIT COURT (COUNTY CLERK) ▼

Cancel Add New Department

Add a New Department

Add a New Home Ruled Department



Customize Funds, Departments, Debts, Rev. Codes

- How to link Debt.

[Select Unit](#) > [Unit Main Menu](#) > [Customize Unit](#) > [Customize Debts by Fund](#)

Selected Year: 2018 | Selected Unit: Gateway1 County - 9910 Training City 1, Gateway1 Co.

Customize Debts by Funds

Debts are available as listed under the Debt Management application. Each debt may be attached to only one fund per year.

Fund Descriptions	Edit Debts	Debts
0180 - DEBT SERVICE		Test QSCB Debt

for government units

Home About Account

Select Unit > Unit Main Menu > Customize Unit

Selected Year: 2018 | Selected Unit: Gateway1

Customize Debts by Funds

Debts are available as listed under the Debt M

Fund Descriptions
0180 - DEBT SERVICE

The Indiana Gateway for Government Units provides e to the Indiana Department of Local Government Finance the Indiana Business Research Center as part of the

for Indiana Data Site

Department of Government Finance

Customize Debts by Fund

Selected Unit: 9910 Training City 1, Gateway1 Co.
Selected Year: 2018

Available Debts:

Check/Uncheck All

- Test Lease
- Test Debt
- Test QSCB Debt
- Fees
- Anticipated Debt Service

Cancel Update Record

POWERED BY Information for Indiana



Customize Funds, Departments, Debts, Rev. Codes

- How to add a Revenue Code.

[Select Unit](#) > [Unit Main Menu](#) > [Customize Unit](#) > **Customize Revenue Codes**

Selected Year: 2018 | Selected Unit: Gateway1 County - 9910 Training City 1, Gateway1 Co.

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						



Current Year Financial Worksheet

Formerly called
"Line 2 Worksheet"

Select Fund:

0101 - GENERAL

Calculates lines of the Form 4B

Line 2	
APPROPRIATIONS	
1. Current Year Approved Budget	\$ 3,239,398
2. Encumbrances Brought Forward	\$ 62,299
3. Changes to Appropriations:	
a) Additional Appropriations (January to June)	\$ 0
b) Reductions January through June	\$ 0
4. Other Non-Appropriated Obligations	\$ 0
5. Total Approved Appropriations	\$ 3,301,697
DISBURSEMENTS	
6. January through June Current Year Disbursements	\$ 1,451,410
7. Appropriation Balance	\$ 1,850,287
8. Reductions July through December	\$ 0
9. Estimated Current Year Expenditures July through December	\$ 1,850,287
Line 3	
10. Proposed/Approved Additional Appropriations for July through Dec. of Current Year	\$ 0
Line 4A	
11. Levy excess not transferred prior to June 30	\$ 0
12. Temporary Loans outstanding as of June 30	\$ 0
What fund loaned the cash on Line 12?	
13. Temporary loans not included in Lines 2 or 3	\$ 0
Line 4B	
14. Temp loans to be repaid in the first six months of ensuing year	\$ 0
What fund loaned the cash on Line 14?	
Line 6	
15. June 30 Cash Balance, including investments	\$ 1376872
Line 7	
16. Taxes to be collected, present year (December settlement)	\$ 677417

Line 2

Line 3

Line 4a

Line 4b

Line 6

Line 7



Current Year Financial Worksheet

- CYFW – Shows snapshot of budget and financial standings as of June 30.
- This form should be completed for each fund.
- It calculates 6 “lines” of the Form 4B.



Current Year Financial Worksheet

- Most common lines:
 - **Line 2** - Budget left to spend in the last 6 months.
 - **Line 6** - June 30 cash balance.
 - **Line 7** - Property taxes to be received in the last 6 months.



Debt Worksheet

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

Prescribed by Department of Local Government Finance

DEBT WORKSHEET

Selected Year: 2015

Selected County: Jay County

Selected Unit: Portland Civil City

Select Fund:

1380 - PARK BOND

(This form is to be prepared for each debt service fund that requires either a tax rate or an appropriation. Debt service funds designated by an "8" in the third digit of the fund code.)

Name of Issue	Line 2 Due	Line 2 Amount	Line 1 Due	Line 1 Amount	Line 11A Due	Line 11A Amount	Line 11B Due	Line 11B Amount
Park Bond	01/01/2017	\$ 98,448	01/01/2018	\$ 124,796	07/01/2018	\$ 26,278	01/01/2019	\$ 101,278
Anticipated Debt Service		\$		\$		\$		\$
TOTALS BY FUND		\$ 98,448		\$ 124,796		\$ 26,278		\$ 101,278
TOTALS BY UNIT		\$ 98,448		\$ 124,796		\$ 26,278		\$ 101,278

This form allows you to tell us when you make your debt payments for four different time periods.



Debt Worksheet

Prescribed by Department of Local Government Finance

DEBT WORKSHEET DATA ENTRY

Selected Year: 2018

Selected County: Monroe County

Selected Unit: Bloomington Civil City

Selected Fund: 0182 Bond #2

(This form is to be prepared for each debt service fund that requires either a tax rate or an appropriation. Debt service funds designated by an "8" in the third digit of the fund code.)

Selected Debt: General Obligation Bonds Series 2016 F519

Date	Period Total	Trustee Fee	Lease Pmts.	Total	Line 2	Line 1	Line 11A	Line 11B
					07/01/2017 to 12/31/2017	01/01/2018 to 12/31/2018	01/01/2019 to 06/30/2019	07/01/2019 to 12/31/2019
8/15/2017	382,183			382,183	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/15/2018	365,238			365,238	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8/15/2018	383,388			383,388	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/15/2019	396,338			396,338	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8/15/2019	389,138			389,138	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2/15/2020	391,988			391,988	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8/15/2020	389,238			389,238	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



This form allows you to tell us when you make your debt payments for four different time periods.



Debt Worksheet

- Debt Worksheet captures the payments needing to be made in a 2.5 year period.
 - Last 6 months of current year (July - Dec.).
 - All the ensuing budget year.
 - First 6 months of the following year (Jan. - June).
 - Second 6 months of the following year (July – Dec.).



Debt Worksheet

- Customize Debt page and how to link.
- Anticipated Debt Service – Manual data entry of amounts.
- If you do not have any debt, you may skip the Debt Worksheet.



Form 2: Revenue Estimates

Broken down by fund



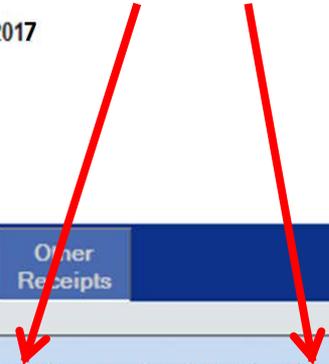
Select Fund:

0101 - GENERAL

Organized by category



Two separate time periods



ESTIMATE OF MISCELLANEOUS REVENUES
FROM SOURCES OTHER THAN GENERAL PROPERTY TAXES
FOR USE IN PREPARATION OF ESTIMATE OF FUNDS TO BE RAISED, YEAR 2017

		Taxes And Intergovernmental	<u>Licenses And Permits</u>	Charges For Services	Fines, Forfeitures, And Fees	Other Receipts		
Revenue Code	Description			July 1 to Dec 31, 2016	Jan 1 to Dec 31, 2017			
R203	Planning, Zoning, and Building Permits and Fees	\$	10,000	\$	20,000			
R210	Cable TV Licenses	\$	22,000	\$	40,000			
TOTALS BY CATEGORY		Total: \$ 32,000		Total: \$ 60,000				
TOTALS BY FUND		Total: \$ 32,000		Total: \$ 60,000				
TOTALS BY UNIT		Total: \$ 32,000		Total: \$ 60,000				

SAVE



Budget Form 2

- Budget Form 2 – Estimate of Miscellaneous Revenue
 - Accounts for revenue other than property taxes.
 - Each fund has its own Form 2.



Budget Form 2

- Column A is for revenue to be received July 1 to Dec. 31 of the current year.

Column A amount will transfer from the Form 2 to Line 8A of the Form 4B.

- Column B is for revenue to be received Jan. 1 to Dec. 31 of the ensuing budget year.

Column B amount will transfer from the Form 2 to Line 8B of the Form 4B.



Budget Form 1: Next Year's Budget

Broken down by fund (and department)

Further broken down by expenditure category

BUDGET ESTIMATE FOR

Select Fund:

Select Department:

Select Category Tab

Personal Services		Supplies		Services And Charges		Capital Outlays		Debt Service		Property Tax Cap	
Sub-Category	Line Item Code	Description	Advertised Amount		Adopted Amount	Add/Delete					
Printing and Advertising	<input type="text" value="321"/>	<input type="text" value="Publication Fees"/>	\$ <input type="text" value="1,000"/>		\$ <input type="text"/>	<input type="text" value="X"/>					
Insurance	<input type="text" value="322"/>	<input type="text" value="Liability Insurance"/>	\$ <input type="text" value="6,000"/>		\$ <input type="text"/>	<input type="text" value="X"/>					
Professional Services	<input type="text" value="324"/>	<input type="text" value="Attorney"/>	\$ <input type="text" value="4,500"/>		\$ <input type="text"/>	<input type="text" value="X"/>					
Communication and Transportation	<input type="text" value="326"/>	<input type="text" value="Fuel"/>	\$ <input type="text" value="12,000"/>		\$ <input type="text"/>	<input type="text" value="X"/>					
<input type="text" value="Professional Services"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>	<input type="text" value="+ ADD"/>					
TOTALS BY CATEGORY			Total: \$ 23,500		Total: \$ 0						
TOTALS BY DEPT BY FUND			Total: \$ 28,700		Total: \$ 0						
TOTALS BY FUND			Total: \$ 28,700		Total: \$ 0						
TOTALS BY UNIT			Total: \$ 181,000		Total: \$ 0						

Line items

SAVE



Budget Form 1: Next Year's Budget

- Budget Form 1 – Budget Estimate
 - Form 1 is divided into six categories for cities and towns:
 - Personal services
 - Supplies
 - Other services and charges
 - Capital outlays
 - Debt service
 - Property tax cap estimates



Budget Form 1: Next Year's Budget

- This form breaks down budgeted "line items" by fund and expense category.
- Each fund has its own Form 1.
- If a fund has departments, each department in a fund will have a separate Form 1.
- Amounts are separated into Advertised and Adopted columns.
- Form 1 data will be pulled into Form 4A.
- Line Items in the Form 1 roll over from the previous year, however **Capital Outlays do NOT roll over.**



Budget Form 4A: (Summary of Form 1)

Budget Report

Select Fund:

0101 - GENERAL

Select Department:

0069 CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)

Click to Insert All Unit Amounts
From Form 1

Click to insert all
Form 1 Data

DEPARTMENT: 0069 CITY COUNCIL/TOWN BOARD (COMMON COUNCIL)

	Published Amount		Adopted Amount	
PERSONAL SERVICES	\$	1,310,434	\$	1,310,434
SUPPLIES	\$	6,000	\$	6,000
OTHER SERVICES AND CHARGES	\$	488,500	\$	488,500
CAPITAL OUTLAY	\$	40,000	\$	40,000
DEBT SERVICE	\$	0	\$	0
TOTAL	\$	1,844,934	\$	1,844,934

Totals by Fund

Published Amount Total: \$ 3,492,334

Adopted Amount Total: \$ 3,492,334

Totals by Unit

Published Amount Total: \$ 4,961,966

Adopted Amount Total: \$ 4,961,966

Summary of Form 1 line
items by category

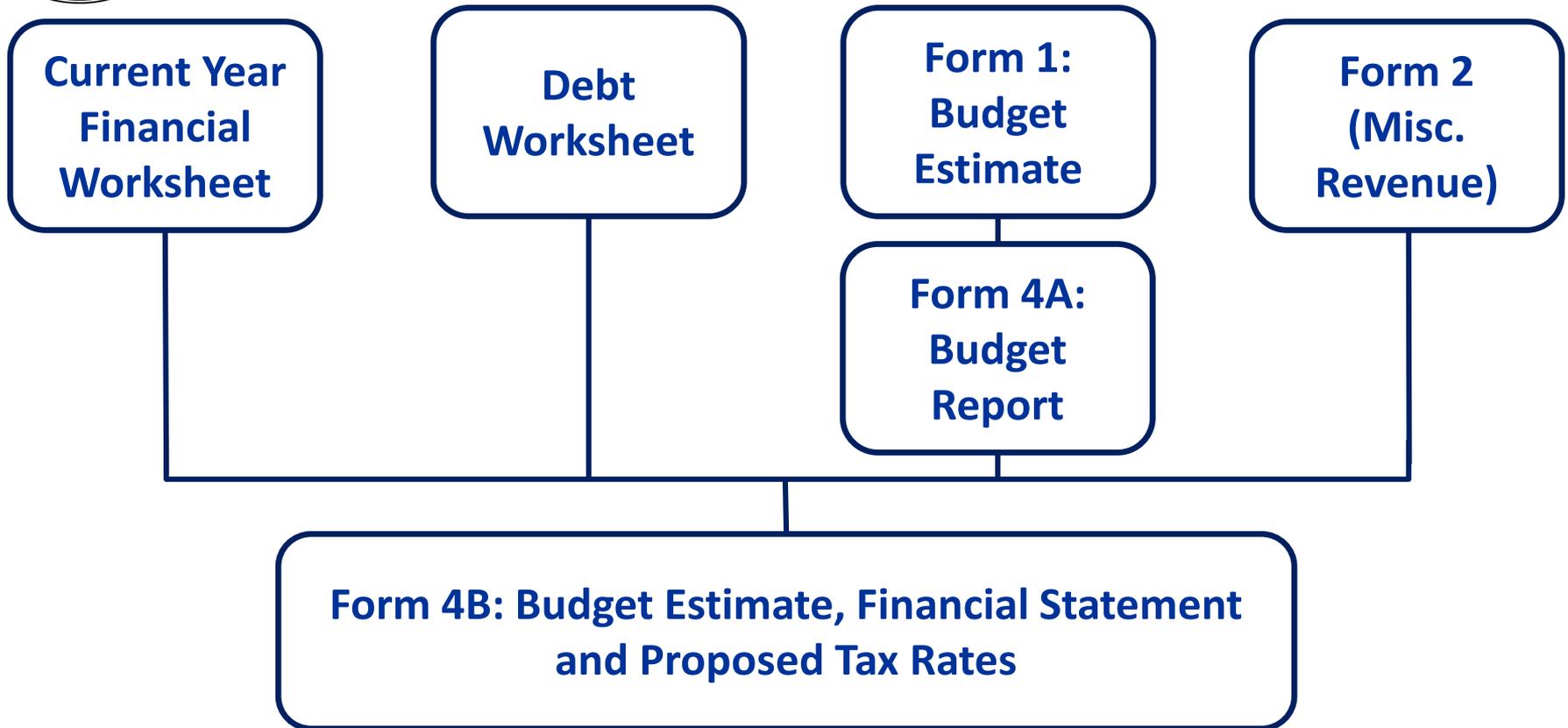


Budget Form 4A

- Budget Form 4A – Summary of Form 1
 - Lists a fund's budget summarized by expenditure category.
 - If fund is departmentalized, it breaks down amounts by department as well.
 - Two columns:
 - Original advertised budget
 - Adopted budget
- Click the “Insert” button to pull data from Form 1.
- Anytime data is changed in Form 1, click the “Insert” button again.



What Data Pulls into Form 4B?



These forms pull into lines 1 through 10 of Form 4B.



Budget Form 4B

Net Assessed Value ↘

Net Assessed Value \$ 175,000,000

Expenses

Funding

Funds Required For Expenses To December 31st Of Incoming Year		Published Amount	Adopted Amount
1. Total budget estimate for incoming year ⓘ		\$ 3,492,334	\$ 0
2. Necessary expenditures, July 1 to December 31 of present year, to be made from appropriation unexpended ⓘ		\$ 2,081,641	\$ 0
3. Additional appropriation necessary to be made July 1 to December 31 of present year ⓘ		\$ 0	\$ 0
4. Outstanding temporary loans:			
a). To be paid not included in lines 2 or 3 ⓘ		\$ 0	\$ 0
b). Not repaid by December 31 of present year ⓘ		\$ 0	\$ 0
5. TOTAL FUNDS required (add lines 1,2,3,4a and 4b) ⓘ		\$ 5,573,975	\$ 0
Funds On Hand To Be Received From Sources Other Than Proposed Tax Levy		Published Amount	Adopted Amount
6. Actual cash balance, June 30 of present year (including cash investments) ⓘ		\$ 1,924,370	\$ 0
7. Taxes to be collected, present year (December settlement)		\$ 716,446	\$ 0
8. Miscellaneous revenue to be received July 1 of present year to December 31 of incoming year(Schedule on File):			
a). Total Column A Budget Form 2 ⓘ		\$ 632,255	\$ 0
b). Total Column B Budget Form 2 ⓘ		\$ 983,104	\$ 0
9. TOTAL FUNDS (Add lines 6, 7, 8a and 8b) ⓘ		\$ 4,256,175	\$ 0
10. Net amount to be raised for expenses to December 31 of incoming year (deduct line 9 from 5) ⓘ		\$ 1,317,800	\$ 0



Budget Form 4B

**Calculates
Tax levy,
rate &
operating
balance**

Proposed Tax Rate and Levy	Published Amount	Adopted Amount
11. Operating balance (not in excess of expense January 1 to June 30, less miscellaneous revenue for same period) ⓘ <small>NOTE: Enter Lines 13a, 13b and 16 then press 'Save' button to calculate this value.</small>	\$ 250,000	\$ 0
12. Amount to be raised by tax levy (add lines 10 and 11) ⓘ	\$ 1,567,800	\$ 0
13a. Property Tax Replacement Credit from Local Option Tax ⓘ	\$ ██████████	\$ ██████████
13b. Operating LOIT ⓘ	\$ ██████████	\$ ██████████
14. NET AMOUNT TO BE RAISED BY TAX LEVY (deduct line 13a and 13b from line 12) ⓘ	\$ 1,567,800	\$ 0
15. Levy Excess Fund applied to current budget ⓘ	\$ 0	\$ 0
16. Net amount to be raised ⓘ	\$ 1,567,800	\$ 0
17. Net Tax Rate on each one hundred dollars of taxable property ⓘ	0.8959	0.0000



Budget Form 4B

- Budget Form 4B – Financial Statement
 - Also known as the “16 Line Statement” or the “Fund Report.”
- Shows financial snapshot for an 18-month period.
- Two columns:
 - Advertised – Reflects budget, rate, and levy as prepared by the fiscal officer.
 - Adopted – Reflects budget, rate, and levy as approved by the fiscal body.



Budget Form 4B

- Provides estimated levy and tax rate per fund.
- Lines 1-10 pull in from other forms.
- Lines 11-17 are to calculate a property tax levy and rate. (Gateway Calculator can help!)



Budget Form 4B

Gateway Calculator available to help complete the bottom section

Enter the selected field and save

10. Net amount to be raised for expenses to December 31 of incoming year (deduct line 9 from 5) ⓘ	\$ 1,317,800	\$ 0
<input type="radio"/> I want to make my own calculations for this Form 4B <input checked="" type="radio"/> I want to use the Gateway Calculator ⓘ <input checked="" type="checkbox"/> I acknowledge that I am responsible for verifying the accuracy of the information submitted to the Department through the Gateway website. I acknowledge that neither the Department of Local Government Finance nor the Indiana Business Research Center is liable for the calculations performed by the Gateway calculator.	<input type="radio"/> Enter Operating Bal. (Fill line 11) <input checked="" type="radio"/> Enter Levy (Fill line 16) <input type="radio"/> Enter Rate (Fill line 17)	<input type="radio"/> Enter Operating Bal. (Fill line 11) <input type="radio"/> Enter Levy (Fill line 16) <input type="radio"/> Enter Rate (Fill line 17)
Proposed Tax Rate and Levy	Published Amount	Adopted Amount
11. Operating balance (not in excess of expense January 1 to June 30, less miscellaneous revenue for same period) ⓘ <small>NOTE: Enter Lines 13a, 13b and 16 then press 'Save' button to calculate this value.</small>	\$ <input type="text"/>	\$ 0 <input type="text"/>
12. Amount to be raised by tax levy (add lines 10 and 11) ⓘ	\$ <input type="text"/>	\$ 0 <input type="text"/>
13a. Property Tax Replacement Credit from Local Option Tax ⓘ	\$ <input type="text"/>	\$ 0 <input type="text"/>
13b. Operating LOIT ⓘ	\$ <input type="text"/>	\$ 0 <input type="text"/>
14. NET AMOUNT TO BE RAISED BY TAX LEVY (deduct line 13a and 13b from line 12) ⓘ	\$ <input type="text"/>	\$ 0 <input type="text"/>
15. Levy Excess Fund applied to current budget ⓘ	\$ <input type="text"/>	\$ 0 <input type="text"/>
16. Net amount to be raised ⓘ	\$ 1567800 <input type="text"/>	\$ 0 <input type="text"/>
17. Net Tax Rate on each one hundred dollars of taxable property ⓘ	<input type="text"/>	0.0000 <input type="text"/>

Calculates Tax levy and rate



Save/Calculate



Budget Form 4B

- Gateway Calculator
 - Units may make their own calculations, or use the Gateway Calculator.
 - Enter Operating Bal. (Fill Line 11)
 - Enter Levy (Fill Line 16) - Most Common

<input type="radio"/> I want to make my own calculations for this Form 4B	<input type="radio"/> Enter Operating Bal. (Fill line 11)	<input type="radio"/> Enter Operating Bal. (Fill line 11)
<input checked="" type="radio"/> I want to use the Gateway Calculator	<input type="radio"/> Enter Levy (Fill line 16)	<input type="radio"/> Enter Levy (Fill line 16)
<input checked="" type="checkbox"/> <small>I acknowledge that I am responsible for verifying the accuracy of the information submitted to the Department through the Gateway website. I acknowledge that neither the Department of Local Government Finance nor the Indiana Business Research Center is liable for the calculations performed by the Gateway calculator.</small>	<input type="radio"/> Enter Rate (Fill line 17)	<input type="radio"/> Enter Rate (Fill line 17)

- Make sure NAV entered.
 - If unsure, contact Budget Field Representative.



Form 3: Notice to Taxpayers

- Notifies taxpayers of the public and adoption meeting information, along with the estimated max levy and property tax cap loses.

Complete details of budget estimates by fund and/or department may be seen by visiting the office of this unit of government at [401 N. Morton Street, Bloomington, IN 47404](#).

Notice is hereby given to taxpayers of [Bloomington Civil City, Monroe County](#), Indiana that the proper officers of [Bloomington Civil City](#) will conduct a public hearing on the year [2018](#) budget. Following this meeting, any ten or more taxpayers may object to a budget, tax rate, or tax levy by filing an objection petition with the proper officers of [Bloomington Civil City](#) not more than seven days after the hearing. The objection petition must identify the provisions of the budget, tax rate, or tax levy to which taxpayers object. If a petition is filed, [Bloomington Civil City](#) shall adopt with the budget a finding concerning the objections in the petition and testimony presented. Following the aforementioned hearing, the proper officers of [Bloomington Civil City](#) will meet to adopt the following budget:

Date of Public Hearing	Wednesday, September 27 2017
Time of Public Hearing	6:30 PM
Public Hearing Place	City Council Chambers

Date of Adoption Meeting	Wednesday, October 11 2017
Time of Adoption Meeting	6:30 PM
Adoption Meeting Place	City Council Chambers

Estimated Civil Max Levy	\$ 29,818,882
Property Tax Cap Credit Estimate	\$ 1,039,240



Form 3: Notice to Taxpayers

- Notifies taxpayers of proposed Budget and Property Tax Levy by fund.

1 Fund Name	2 Budget Estimate	3 Maximum Estimated Funds to be Raised (including appeals and levies exempt from maximum levy limitations)	4 Excessive Levy Appeals	5 Current Tax Levy
0101-GENERAL	\$3,411,319	\$2,027,743	\$0	\$1,912,496
0341-FIRE PENSION	\$153,925	\$0	\$0	\$0
0342-POLICE PENSION	\$90,369	\$0	\$0	\$0
0706-LOCAL ROAD & STREET	\$23,101	\$0	\$0	\$0



Form 3: Notice to Taxpayers

- Current Tax Levy is automatically populated.
- Advertised online by submitting Form 3 in Gateway at least 10 days before public hearing (www.budgetnotices.in.gov).
- At least 10 calendar days between public hearing and adoption. (Exception for 2nd class cities)



Form 3: Notice to Taxpayers

- Deadlines
 - Public Hearing no later than **Oct. 22.**
 - Adoption Meeting no later than **Nov. 1.**
 - Dates subject to change due to non-business days.
Review the annual budget calendar for official dates.
- Required Information to be advertised
 - Date, time, and location of public hearing and adoption meeting.
 - Estimated maximum levy and circuit breaker impact.
 - Fund name, budget estimate, fund levy, excessive levy appeal, and current fund levy.



Form 3: Notice to Taxpayers

- Question to be answered when completing the Form 3:
 - Has the territory of the unit changed?
 - Annexations
 - Extensions of Services
 - This question will impact how the unit is handled for the purposes of online ads.



Budget Form 3

**Form 3 must be submitted by the Clerk-Treasurer/
City Controller at least 10 calendar days before the
public hearing.**

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	⚠

 [Click to edit form](#)  [Click to submit completed form to DLGF](#)

**Submit to fulfill
online advertising**



Form 3: Notice to Taxpayers

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



Budget Form 4 (Adoption)

ORDINANCE OR RESOLUTION FOR APPROPRIATIONS AND TAX RATES

Be it ordained/resolved by the **GrassyFork Township Board** that for the expenses of **GRASSY FORK TOWNSHIP, Jackson County** for the year ending December 31, **2016** the sums herein specified are hereby appropriated and ordered set apart out of the several funds herein named and for the purposes herein specified, subject to the laws governing the same. Such sums herein appropriated shall be held to include all expenditures authorized to be made during the year, unless otherwise expressly stipulated and provided for by law. In addition, for the purposes of raising revenue to meet the necessary expenses of **GRASSY FORK TOWNSHIP, Jackson County**, the property tax levies and property tax rates as herein specified are included herein. Budget Form 4-B for all funds must be completed and submitted in the manner prescribed by the Department of Local Government Finance.

This ordinance/resolution shall be in full force and effect from and after its passage and approval by the **GrassyFork Township Board**.

Name of Adopting Entity / Fiscal Body	Type of Adopting Entity / Fiscal Body	Date of Adoption
GrassyFork Township Board	Township Board	09/24/2016

DLGF-Reviewed Funds

Fund Code	Fund Name	Adopted Budget	Adopted Tax Levy	Adopted Tax Rate
0101	GENERAL	\$22,150	\$9,600	0.0216
0840	TOWNSHIP ASSISTANCE	\$4,800	\$6,000	0.0135
		\$26,950	\$15,600	0.0351

Name		Signature
Craig Klinge	Aye <input type="checkbox"/> Nay <input type="checkbox"/> Abstain <input type="checkbox"/>	
Jeanette Elliott	Aye <input type="checkbox"/> Nay <input type="checkbox"/> Abstain <input type="checkbox"/>	
Stan Darlage	Aye <input type="checkbox"/> Nay <input type="checkbox"/> Abstain <input type="checkbox"/>	



Budget Form 4 (Adoption)

- Budget Form 4 – Adoption Ordinance/Resolution
 - Fiscal body adopts the Form 4, approving budgets, tax levies, and tax rates.
 - Budgets, tax levies, and tax rates for all funds must be listed.
- Budgets, Tax Levies, and Tax Rates transfer from Line 1, 16, and 17 of the Form 4B's adopted column
- Budget is net of property tax caps. This is calculated as Line 1 of Form 4B's adopted column minus the property tax cap amount at bottom of Form 4B.
- Double and triple check the amounts on the Form 4 for each fund. These are the amounts being formally adopted.



Budget Form 4 (Adoption)

- Adoption date should be the same as shown on Form 3.
- Attestation line applies only to counties, cities, and towns. Mayor Action line only applies to cities.
- The voting members must mark their vote and sign the Form 4.
- After adoption the signed Form 4 must be scanned and uploaded into Gateway.



1782 Notice Recipients

1782 Notice Recipients

Use this form to register any recipients of this unit's 1782 notice e-mail.

Contact Name	Contact Email	Phone Number (Optional)	Action
Steve McQueen	SMcQueen@email.com	(555) 123-4567	Edit --- Delete
<input type="text" value="Leia Burke"/>	<input type="text" value="LBurke@email.com"/>	<input type="text" value="(555) 765-5321"/>	Add

- After the DLGF works your budget, a “1782 Notice” is emailed to everyone on this form. This notice contains the budgets, levies, and rates about to be certified.
- The Department recommends adding multiple recipients to this form.



Upload Signed Form 4

Select "Form 4"

Submit File
Select file type: Signed Budget Ordinance/Resolution (Form 4) Enter description for 'Other':
Enter a Description: Form 4
Select File to Upload: Browse... No file selected.
Upload File

Enter Description

Select browse to locate your document

- Within 48 hours of adoption, the Signed Form 4 needs to be scanned and uploaded into Gateway.
- The same 48 hour timeline applies to submitting the remaining budget forms in Gateway.



DLGF Gateway Access

- Permissions (Submit, Edit, Read-only)
 - Submitter: The person who holds the office or position which is required to submit reports to the State. Only someone with Submitter status can actually view and use the submit process within DLGF Gateway applications.
 - The **Clerk-Treasurer/City Controller** is the Submitter for City/Town units. There can only be one submitter for the Budget application.
 - Editor: A person who is authorized by the Clerk-Treasurer/City Controller to have access to the Gateway applications for reporting.
 - The only way to authorize is to submit a valid DLGF LDA form.
 - The Editor can enter information, but will not have the ability to submit in Gateway.
 - Read-only: An individual who is authorized by the Clerk-Treasurer/City Controller to read application data without any ability to edit or submit data.



DLGF Gateway Access

- Budget Form “Unlock” requests
 - In order for the DLGF to unlock a submitted Budget form, the request must come directly from either the Clerk-Treasurer/City Controller, OR an individual with a valid DLGF LDA form on file granting them “edit” access to the Budgets application.
 - If possible, the Department would prefer that the request be sent via email to gateway@dlgf.in.gov so that the unlock request is in writing.
 - If you would like to delegate access to someone, please email gateway@dlgf.in.gov and request a DLGF LDA.



DLGF Gateway Access

- How to check who has access to the Budgets application:
 - From the Unit Main Menu in Budgets, click “Unit Specifications”.
 - If you would like to add/remove access, please email gateway@dlgf.in.gov.

Other Items

- Gateway Survey
- Unit Specifications**
- Browser ID

Unit Specifications

3/7/2018 2:24:28 PM

Current Permissions for this unit:

User Name	Role	Last Gateway Login
	Submitter	3/1/2018 10:10:24 PM
	Editor	5/22/2017 4:06:37 PM
	Editor	5/22/2017 4:03:04 PM
	Editor	2/15/2018 4:21:46 PM
	Editor	5/23/2017 3:02:12 PM
	Editor	3/1/2018 7:08:50 PM
	Editor	3/1/2018 5:05:09 PM
	Read-Only	3/3/2012 5:59:24 PM
	Read-Only	3/2/2018 4:50:38 PM
	Read-Only	3/7/2018 6:45:22 PM
	Read-Only	7/4/2016 1:51:58 PM
	Read-Only	3/1/2013 8:22:12 PM



DLGF Gateway Access

- Gateway Username
 - Must be a valid (working) email address.
 - The associated user must be the only person with access to the login information to Gateway, as well as the login information to the email address.
 - If possible, as specific email address (i.e. BugsBunny@yahoo.com) is preferred over a generic email address (i.e. LooneyTunesTown@yahoo.com).



Who To Contact With Questions

- Budget Field Representative or Gateway?
 - Technical DLGF Gateway Question/Comment
 - Contact Gateway (gateway@dlgf.in.gov)
 - Examples:
 - Trouble saving. How to link/unlink a debt from the Debt Worksheet.
 - Unlock Requests.
 - Login Trouble/Access/PIN number.
 - Non-technical DLGF Question/Comment
 - Contact your Budget Field Representative.
 - Examples:
 - What numbers should I enter in my Form 2?
 - What should I do next in the Budget Process?
 - Where can I find this number?

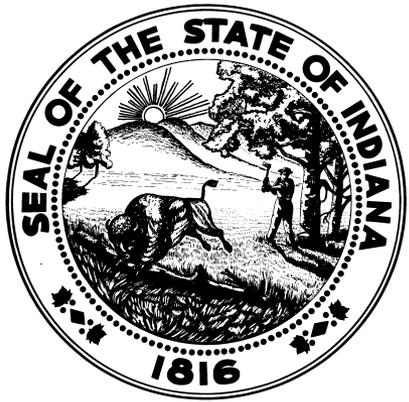


Who To Contact With Questions

- Which agency should I contact with Gateway questions?

Which agency should I contact if I have a Gateway Question?

DLGF Gateway Team (gateway@dlgf.in.gov) (317-234-4480)	SBOA Gateway Team (gateway@sboa.in.gov) (317-232-2513)
Budgets [CYFW, Debt Worksheet, Form 1, Form 2, Form 3, Form 4, Form 4A, Form 4B, 1782 Notice]	100R [Attestation Form]
Debt Management	Annual Financial Report (AFR)
Economic Development Reporting (EDR)	ECA Risk Report
Other Post-Employment Benefits (OPEB)	E-1 Entity Annual Report
TIF Management	Nepotism Policy Upload
File Transmission/ Contract Upload	Contracting Policy Upload
	Risk Assessment
	Surety Bonds
	Internal Controls
	SDAR/ CTAR
	Conflict of Interest Disclosure



Questions??



Resources

- User Guides:
<https://gateway.ifionline.org/help.aspx>
- Information Icons 
- **You**  **Tube** ining Videos
www.youtube.com/user/DLGFgateway
- DLGF Memos (Budget Calendar and more!)
www.in.gov/dlgf/2444
- Email: gateway@dlgf.in.gov
- Call: (317) 234-4480



Budget Field Staff

Miranda Bucy	317-650-6848	mbucy@dlgf.in.gov
Ryan Burke	317-719-3546	rburke@dlgf.in.gov
Kim Chattin	317-650-6157	kchattin@dlgf.in.gov
George Helton	317-650-5254	ghelton@dlgf.in.gov
Wayne Hudson	317-650-4444	whudson@dlgf.in.gov
Vicky Neeley	317-607-7524	vneeley@dlgf.in.gov
Robert Norris	317-650-3932	robnorris@dlgf.IN.gov
Kurt Ott	317-650-2497	kott@dlgf.in.gov
Dawn Ray	317-677-2667	dray@dlgf.in.gov
Judy Robertson	317-650-2508	jrobertson@dlgf.in.gov
Michelle Rogers	317-447-2941	mrogers@dlgf.in.gov
Heather Witsman	317-694-3017	hwitsman@dlgf.in.gov



Contact the Department

- Budget Field Representative:
[http://www.in.gov/dlgf/files/Field Rep Map - Budget.pdf](http://www.in.gov/dlgf/files/Field_Rep_Map_Budget.pdf)
- Gateway: gateway@dlgf.in.gov
- Telephone: (317) 232-3777
- Toll Free: (888) 739-9826
- Website: www.in.gov/dlgf
- “Contact Us”: www.in.gov/dlgf/2338.htm