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Gateway User Guide

Form 4A BUDGET REPORT



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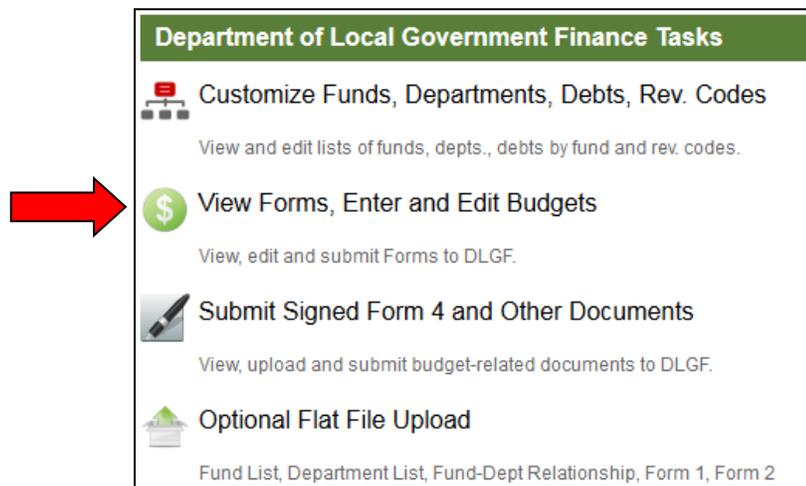


Getting Ready

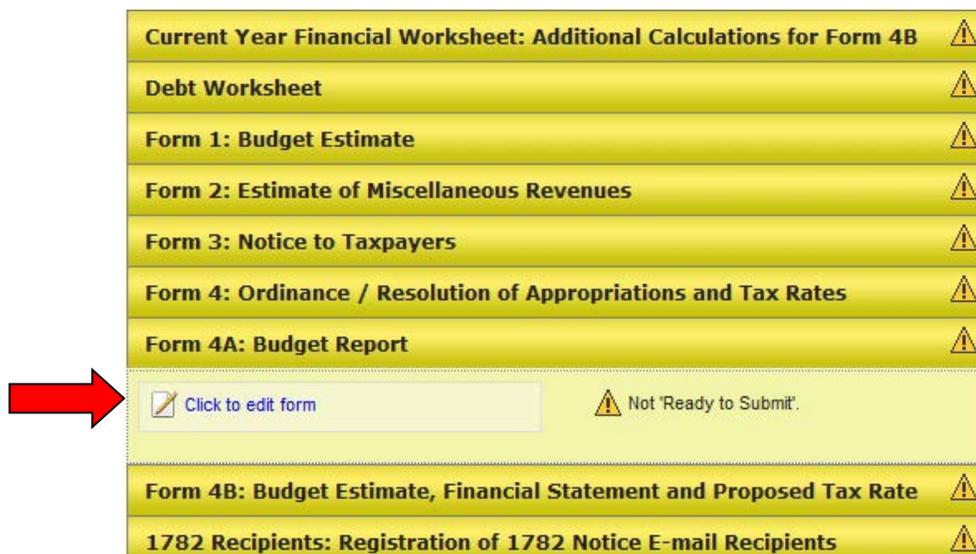
Form 4A presents the unit's budget subtotaled by fund, department, and major classification (Personal Services, Supplies, Other Services and Charges, Capital Outlays, Debt Service, Township Assistance, and Property Tax Cap).

Accessing the Form 4A

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



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





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.

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 Revenue Codes List



Customize Departments List

Select revenue codes for use within this unit's Form 2.



Customize Departments by Fund List



Customize Debts by Fund List

View and cross-index departments by selected fund.

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 a unit of government is not departmentalized, the department field may be left as "0000 No Department."

Select Fund:
 0005 - CASINO/RIVERBOAT

Select Department:
 0000 NO DEPARTMENT



Entering Data on 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	\$ 100		\$ 200	
SUPPLIES	\$ 300		\$ 400	
OTHER SERVICES AND CHARGES	\$ 0		\$ 0	
CAPITAL OUTLAY	\$ 0		\$ 0	
DEBT SERVICE	\$ 0		\$ 0	
PROPERTY TAX CAP	\$ 0		\$ 0	
TOTAL	\$	400	\$	600



The **Advertised Amount** is the amount that is proposed at the beginning of the budget process and published in Gateway. The **Adopted Amount** is the amount that is approved by the fiscal body and adopted by ordinance or resolution. Form 4A summarizes the amounts entered in Form 1 into category totals.

Completing Form 4A by Pulling Form 1 Values

Form 4A is simply a summary of Form 1. Provided 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.

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	\$ 100		\$ 200	
SUPPLIES	\$ 300		\$ 400	
OTHER SERVICES AND CHARGES	\$ 0		\$ 0	
CAPITAL OUTLAY	\$ 0		\$ 0	
DEBT SERVICE	\$ 0		\$ 0	
PROPERTY TAX CAP	\$ 0		\$ 0	





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.

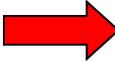


Completing the Form 4A in Stages

Because units propose budget figures at the beginning of budget season and adopt them months later, the Form 1 amounts may be copied while only the advertised column is completed and later the adopted values may later be pulled into Form 4A. Populating the Form 4A updated information entered in Form 1 will be done with the single click of the “Click to Insert All Unit Amounts From Form 1” button.

Select Fund:

Select Department:

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

DEPARTMENT: 0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)		
	Published Amount	Adopted Amount
PERSONAL SERVICES	\$ 100	\$ 200

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 full name and title into the signature box. After that, you will need to enter a 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 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
Bugs Bunny

TITLE
Auditor

SIGNATURE/PIN
••••

DATE
07/11/2016

Form signature values saved at 01:10 PM and 55 seconds.

✔ SIGN AND DATE FORM



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 and all other forms there are “Ready to Submit” status boxes. 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 'Published' 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 published 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 for officials with submission rights. Note: Marking a form as “Ready to Submit” ≠ Form is submitted!

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 

If Form 4A is complete and no further changes will need to be made, 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.”



Are you sure you want to submit this form?

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. Once the Form appears green on the Budget Form Menu, then the form has been **successfully submitted**.

Form 4A: Budget Report 

 Click to view form

 This form has been submitted.

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

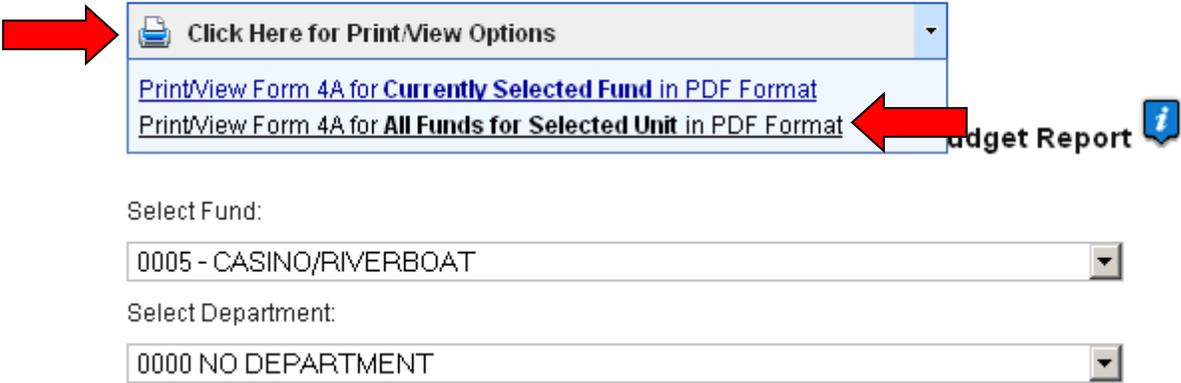
The form may no longer be edited once it has been submitted. If a form has been submitted by mistake, please contact the Department at gateway@dlgf.in.gov.

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 Currently Selected Fund in PDF Format."

[Select Unit](#) > [Unit Main Menu](#) > [Budget Form Menu](#) > **Form 4A**

Selected Year: 2013 | Selected Unit: DLGFIBRC County - 9992 Dlgf City 10, DLGFIBRC Co.

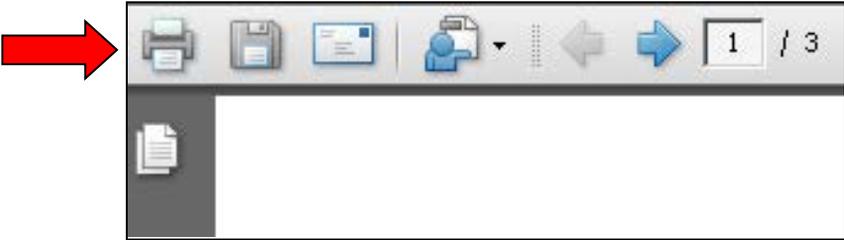


Click Here for Print/View Options
[Print/View Form 4A for **Currently Selected Fund** in PDF Format](#)
[Print/View Form 4A for **All Funds for Selected Unit** in PDF Format](#)

Select Fund:

Select Department:

Once the page appears in a new window, simply click on the printer icon on the top left hand corner to print. The form may also be saved by selecting the save icon to the right of the print icon. This will save the form as a PDF which can be emailed or posted to a website.



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) 234-4480.