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Gateway User Guide

Form 1 Budget Estimate



Table of Contents

Accessing Form 1	2
Ensuring Proper Number of Forms is Available	4
Entering Data on the Form 1	4
Adding a New Line Item	5
Editing Line Items.....	5
Entering Data on an Existing Line Item	6
Deleting a Line Item	6
Property Tax Cap Credits.....	7
Copying Advertised Amounts to Adopted	7
Signing the Form Electronically.....	9
Marking the Form “Ready to Submit”	9
Viewing and Printing the Form	11



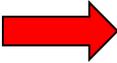
Accessing Form 1

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

Department of Local Government Finance Tasks

-  **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, select “Form 1: Budget Estimate” and notice the menu expand beneath Form 1. Then click on the link on the left side of the Form 1 box that says “Click to edit form.”



Current Year Financial Worksheet: Additional Calculations for Form 4B	
Debt Worksheet	
Form 1: Budget Estimate	
<input type="button" value="Click to edit form"/>	 Not 'Ready to Submit'.
Form 2: Estimate of Miscellaneous Revenues	
Form 3: Notice to Taxpayers	
Form 4: Ordinance / Resolution of Appropriations and Tax Rates	
Form 4A: Budget Report	
Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate	
1782 Recipients: Registration of 1782 Notice E-mail Recipients	



Form 1 navigates through a drop down menu that allows users to select a fund and department. Please note that school units will use the Department field in place of their Program Accounts. As shown below, the form currently displays “No Department.” This is the default for users that are not departmentalized or that have not yet created and linked a department to the selected fund.

BUDGET ESTIMATE FOR

Select Fund:

Select Department:

If a unit’s user previously completed a Budget in Gateway, the user should notice the funds, departments, and line items with data entered carried over from the previous year. Line items in the Capital Outlays tab are the exception and will not be rolled over.

Select Fund:

Select Department:

Copy ALL Advertised Amounts
for ALL Funds

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
Salaries and Wages	<input type="text"/>	Town Council	\$ <input type="text"/>		\$ <input type="text"/>	
Salaries and Wages	<input type="text"/>	Clerk-Treasurer	\$ <input type="text"/>		\$ <input type="text"/>	
Employee Benefits	<input type="text"/>	Employee Benefits	\$ <input type="text"/>		\$ <input type="text"/>	
Salaries And Wages	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>	
TOTALS BY CATEGORY			Total: \$ 0		Total: \$ 0	
TOTALS BY DEPT BY FUND			Total: \$ 0		Total: \$ 0	
TOTALS BY FUND			Total: \$ 0		Total: \$ 0	
TOTALS BY UNIT			Total: \$ 0		Total: \$ 0	



Ensuring Proper Number of Forms is Available

The availability of Form 1's are based upon the unit customization of fund and department combinations. To ensure that the proper number and type of forms are available, please be sure that all necessary funds and departments have been added and linked appropriately to each other. For additional assistance, please see the *Adding, Deleting, and Connecting Funds and Departments user guide*.

Entering Data on the Form 1

For each line item, Form 1 collects five pieces of information:

- (1) sub-category,
- (2) line item code,
- (3) description ,
- (4) advertised amount, and
- (5) adopted amount.

Sub-Category	Line Item Code	Description	Advertised Amount	Adopted Amount	Add
Office Supplies	Optional		\$	\$	+ ADD

The **Sub-Category** field simply breaks down the selected category to additional sub-categories. You will also note another category in the event your line item does not clearly fall into a specific sub-category.

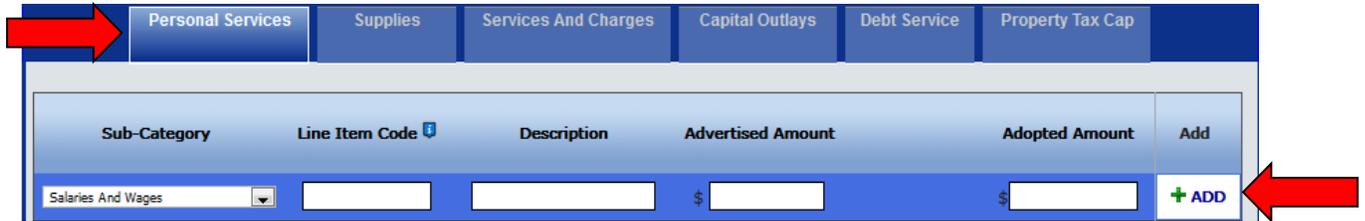
The **Line Item Code** field collects the local code. This may be the State Board of Accounts codes for expenses or a user's own local tracking codes. **Entry of a code in this field is optional**; therefore, some units do not use Line Item Codes. The field is included to assist in tracking expenses back to local record-keeping.

The **Description** field is mandatory, but is a local description and does not need to tie back to any prescribed code lists.

For each line item, Form 1 collects two values: the advertised amount and the adopted amount. The **Advertised Amount** is the amount that is proposed at the beginning of the budget process and published on Gateway. The **Adopted Amount** is the amount that is approved by the fiscal body and adopted by ordinance or resolution.

Adding a New Line Item

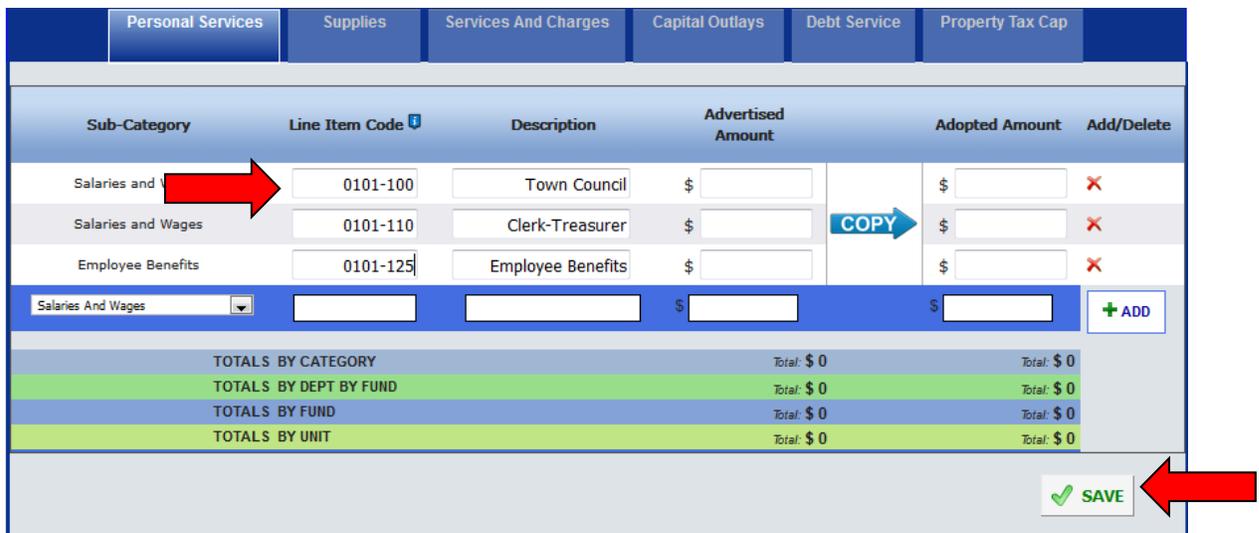
To add a new line item, first select the appropriate category from the blue tabs at the top of the form. Next, select the appropriate sub-category from the drop down menu, add a line item code (optional), and then add a description of the expense. Amounts may also be entered at the same time. After data entry is complete, save by selecting the “+ADD” button on the right hand side.



Sub-Category	Line Item Code	Description	Advertised Amount	Adopted Amount	Add
Salaries And Wages			\$	\$	+ ADD

Editing Line Items

In most cases, the Form 1 contains some pre-existing line items that have rolled over from the previous year. In the event that a line item’s code or description needs to be edited, click in the field that you wish to edit and make the desired changes. After edits are complete, click the “Save” button on the bottom right-hand side of the page.



Sub-Category	Line Item Code	Description	Advertised Amount	Adopted Amount	Add/Delete
Salaries and Wages	0101-100	Town Council	\$	\$	X
Salaries and Wages	0101-110	Clerk-Treasurer	\$	\$	X
Employee Benefits	0101-125	Employee Benefits	\$	\$	X
Salaries And Wages			\$	\$	+ ADD
TOTALS BY CATEGORY			Total: \$ 0	Total: \$ 0	
TOTALS BY DEPT BY FUND			Total: \$ 0	Total: \$ 0	
TOTALS BY FUND			Total: \$ 0	Total: \$ 0	
TOTALS BY UNIT			Total: \$ 0	Total: \$ 0	





Entering Data on an Existing Line Item

To enter amounts on an existing line item, simply select the field, enter the amount, and click “Save”.

Sub-Category	Line Item Code	Description	Advertised Amount	Adopted Amount	Add/Delete
Office Supplies		Office Paper	\$ 300	\$	X
Office Supplies			\$	\$	+ ADD
TOTALS BY CATEGORY			Total: \$ 0	Total: \$ 0	
TOTALS BY DEPT BY FUND			Total: \$ 0	Total: \$ 0	
TOTALS BY FUND			Total: \$ 0	Total: \$ 0	
TOTALS BY UNIT			Total: \$ 0	Total: \$ 0	

Form values saved at 01:01 PM and 13 seconds.

SAVE

Deleting a Line Item

To delete an existing line item select the red “X” on the far right of the page. This will delete a single line item. If an error is made on the sub-category field, delete the line item and enter it below. **After** data entry is complete, save by selecting the “+ADD” button on the right hand side.

Sub-Category	Line Item Code	Description	Advertised Amount	Adopted Amount	Add/Delete
Office Supplies		Office Paper	\$ 300	\$	X

COPY



Property Tax Cap Credits

New for Budget Year 2017, taxing units will now enter estimated property tax cap credits. Property tax cap credits will be entered in the same way that typical expenditures are entered. For departmentalized units, a Property Tax Cap Department is available. Property tax cap credits impact the total estimated expenditure amount by fund, and may be carried to the Form 4A and Form 4B similar to other Form 1 expenditures.

Personal Services		Supplies		Services And Charges		Capital Outlays		Debt Service		Property Tax Cap	
Sub-Category	Line Item Code	Description	Advised Amount		Adopted Amount	Add/Delete					
Property Tax Cap Impact		Property Tax Cap	\$ 150	COPY	\$	X					
Property Tax Cap Impact			\$		\$	+ADD					
TOTALS BY CATEGORY			Total: \$ 150		Total: \$ 0						
TOTALS BY DEPT BY FUND			Total: \$ 150		Total: \$ 0						
TOTALS BY FUND			Total: \$ 150		Total: \$ 0						
TOTALS BY UNIT			Total: \$ 150		Total: \$ 0						

Form values saved at 04:44 PM and 31 seconds. **SAVE**

Copying Advertised Amounts to Adopted

If the budget is adopted without any changes, amounts from the advertised column may be easily copied to the adopted amount column for all funds just by clicking the "Copy ALL Advertised Amounts for All Funds" button.

Select Fund:

0101 - GENERAL

Select Department:

0000 NO DEPARTMENT

**Copy ALL Advertised Amounts
for ALL Funds**



Select Category Tab

Personal Services	Supplies	Services And Charges	Capital Outlays	Debt Service	Property Tax Cap
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To be more selective about what amounts are copied, click on the blue “COPY” arrow between the advertised and adopted column. This will only copy the amounts in the current category of the selected fund and department.

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
Salaries and Wages	<input type="text"/>	Town Council	\$ <input type="text" value="600"/>		\$ <input type="text"/>	<input type="checkbox"/> X
Salaries and Wages	<input type="text"/>	Clerk-Treasurer	\$ <input type="text" value="2,000"/>	COPY →	\$ <input type="text"/>	<input type="checkbox"/> X
Employee Benefits	<input type="text"/>	Employee Benefits	\$ <input type="text" value="500"/>		\$ <input type="text"/>	<input type="checkbox"/> X

You will want to navigate to each combination of categories, funds, and departments to complete the adopted amounts for all line items.

If the adopted amounts have changed from the advertised amounts, simply type in the adopted amounts and click “Save” at the bottom of the form.

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
Office Supplies	<input type="text"/>	Office Paper	\$ <input type="text" value="300"/>	COPY →	\$ <input type="text" value="100"/>	<input type="checkbox"/> X
Office Supplies	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>	<input type="button" value="+ ADD"/>
TOTALS BY CATEGORY			Total: \$ 300		Total: \$ 100	
TOTALS BY DEPT BY FUND			Total: \$ 3,400		Total: \$ 100	
TOTALS BY FUND			Total: \$ 3,400		Total: \$ 100	
TOTALS BY UNIT			Total: \$ 3,400		Total: \$ 100	

Form values saved at 01:07 PM and 51 seconds.



Signing the Form Electronically

At the bottom of Form 1, 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.

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 1.

Marking the Form “Ready to Submit”

At the bottom of Form 1 and all other forms there are “Ready to Submit” status boxes. Before the form is entirely complete, there will be a grey box 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.”*

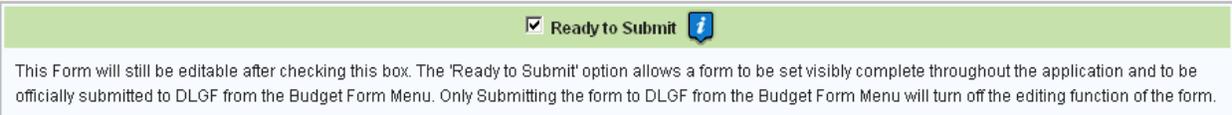
Not Ready To Submit

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.

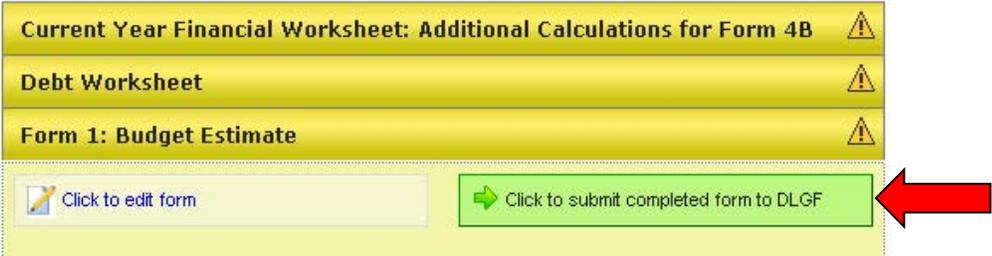
Once information has been entered in the advertised and adopted columns, and the form has been appropriately signed with a PIN, the yellow “Ready to Submit” option will appear. This gives users the ability to mark the form as ready to submit by clicking on the check box. Do not check this box until all the line items, advertised, and adopted amounts are entered.



Once this box is checked, the section will turn green and the form will now be marked as “Ready to Submit.” Form 1 will still be editable until it is submitted.



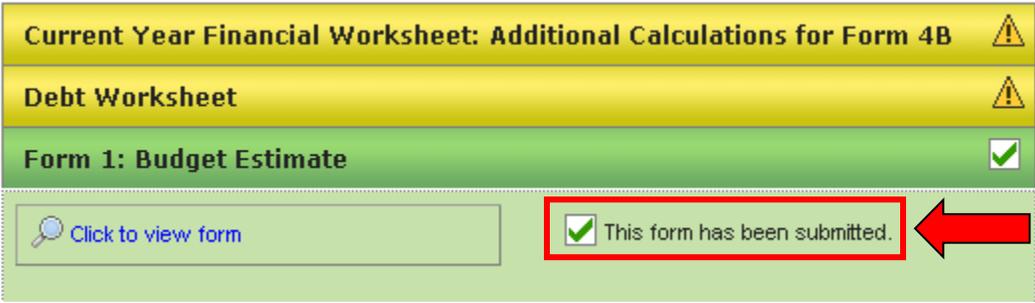
Note that after Form 1 has been marked as “Ready to Submit,” under the Budget Form Menu Form 1 now shows a green submit option for officials with submission rights. Note: Marking a form as “Ready to Submit” ≠ Form is submitted!



If Form 1 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.”



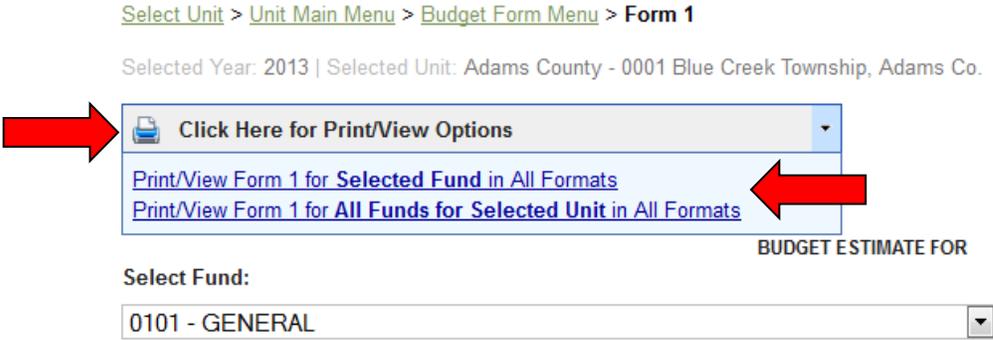
As noted below, Form 1 on the Budget Form Menu will now appear green and will now only appear in “read only” form. Once the Form appears green on the Budget Form Menu, then the form has been **successfully submitted**.



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 to request that it be unsubmitted.

Viewing and Printing the Form

At any point Form 1 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.” From here, the user will have the option to print the currently selected funds or all funds. Please select one.



The page will open in a new window. Once it is open, click on the icon that resembles a save icon in the middle at the top of the page to view the export options.

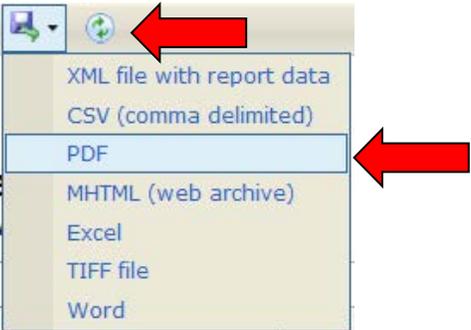


Budget Form 1 - Budget Estimate

Year: 2013 County: Adams Unit: Blue Creek Township

Fund	Department	Category	Sub-Category	Line Item Code	Line Item	Publish
0061 - RAINY DAY	NO DEPARTMENT	SERVICES AND CHARGES	Other Services and Charges		transfer of funds	
0061 - RAINY DAY Total						
0101 - GENERAL	NO DEPARTMENT	PERSONAL SERVICES	Salaries and Wages		Salary of Trustee	

From the list of export options, Form 1 may be exported into a PDF, Word, Excel, or many other different file types. This allows users to personalize how they wish to have the data displayed.



To quickly and easily print off the form, click on "PDF" and then click the printer icon.



Congratulations! Form 1 has been successfully submitted. 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.