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Gateway
User Guide

County Council Review Worksheet
NON-BINDING REVIEW
DUE SEPTEMBER 3, 2013
# Table of Contents

Local Government Unit Data Entry .................................................................................. 3  
County Council Review Worksheet Overview ................................................................. 3  
Accessing the County Council Review Form .................................................................. 3  
Ensuring Proper Options are Available on the Form ....................................................... 4  
Entering Data on the CCRW ............................................................................................ 4  
Pulling the Data from Form 4B: RECOMMENDED ....................................................... 4  
Manual Data Entry ......................................................................................................... 5  
Signing and Submitting the Form Electronically ............................................................ 7  
County Council Review ................................................................................................ 9  
Viewing and Printing the Worksheets ............................................................................ 10
Local Government Unit Data Entry

County Council Review Worksheet Overview

Indiana Code 6-1.1-17-3.5 requires county fiscal bodies to annually review the proposed budgets, levies and rates of certain civil taxing units and to issue non-binding recommendations regarding those proposed budgets, levies and rates.

In the past, this worksheet was completed on Excel or jointly prepared by the local official and the Field Representative at the budget workshop and printed. A hard copy would have to be printed on legal size paper and then delivered to the county auditor.

Now this form will be completed and submitted online to the county through Gateway. Only the means of submission has changed. It is very important to submit this report by September 3, 2013, at the latest, to aid proper budget approval.

Accessing the County Council Review Form

First, navigate to the Unit Main Menu by logging into Gateway, clicking on “Budgets” and selecting your unit. Unlike most forms that are completed through selecting “View Forms, Enter and Edit Budgets,” this worksheet will be accessed by selecting “County Council Review Worksheet” on the left-hand side of the Unit Main Menu.
Ensuring Proper Options are Available on the Form

The availability of funds on the County Council Review Worksheet (CCRW) is based upon the customization of fund list. Listed in the table are all standard funds that are currently added. Please be sure that you have added all the necessary funds in the Customize Funds List of the Customize Unit Menu. For assistance with adding a fund, please see the Adding, Deleting, and Connecting Funds and Departments user guide.

Entering Data on the CCRW

The online CCRW has not changed what data is entered; only the formatting has changed. Information will need to be entered in the NAV section and in all three tabs of this worksheet. Data may be pulled automatically from Form 4B with a single click of a button or entered manually. Prior to pulling data from Form 4B, you will want to ensure that the NAV, and the published amounts of line 1, line 16, and line 17 have all been completed in Form 4B for all non-home-ruled funds and are correct.

Pulling the Data from Form 4B: RECOMMENDED

If the net assessed valuations and the published amounts of lines 1, 16, and 17 of the Form 4B for all DLGF reviewed funds have been completed and are accurate, you can pull all the information required for the form in a single click.
After you have completed and verified the required information is complete in Form 4B, you can bring in the data by clicking the blue, “Copy All Fund Data from Form 4B,” button at the top of the page. Clicking this button will pull in and save all the figures as entered in Form 4B.

Once clicked, the entire form will populate with the data entered on Form 4B. Please be sure to review this information for accuracy and completeness. For each fund, the net assessed value, budget estimate, levy and tax rate should be entered. By default, the page displays the NAV and budget amounts. Please click on the levy and rate tabs to ensure that all data is entered. Some funds may not have a levy or tax rate.

**Manual Data Entry**

The second option to completing this worksheet is through manual data entry. The worksheet has been divided into four separate sections in order to allow a once legal sized form to fit into Gateway.

**Top Half of the Form**

This top section of the form asks for a few pieces of information, much of which will be completed after submitting the worksheet to the county. As the unit undergoing non-binding review, you will need to enter the 2014 Estimate Net Assessed Valuations for each DLGF reviewed fund. These are the same Net Assessed Values found at the top of Form 4B for each fund.

To manually enter the 2014 NAV for a fund, you will first want to click the “Edit” link towards the right of fund name.
After entering the 2014 NAV for a fund, you will want to click the “Update” link on the right-hand side to save the data entered.

You will then want to click the next “Edit” link and continue entering data for the remaining funds.

Bottom Half of the Form

The bottom half of the form is divided into three different sections or tabs. These will function similar to Form 1 and Form 2’s category tabs. You will need to ensure all three tabs are complete before submitting the form.

Budgets Tab

The first tab that is titled Budget, requests the 2014 unit proposed budget amounts. These are the same amounts that are listed on the published column of line 1 of the Form 4B. Please enter the 2014 proposed budget for each DLGF reviewed fund.

Following the same manner as above, click the “Edit” link to the right, enter your amount and then select update. Please be sure to enter amounts for all funds DLGF reviewed funds.

You will notice that after entering data and saving the amount, the next three columns will calculate themselves automatically.

Levy Tab

The second section is titled “Levy,” it can be accessed by clicking on the Levy tab. This section requests the 2014 unit proposed levy amounts. These are the same amounts as listed on the published column of line 16 of the Form 4B. To enter a levy, click the “Edit” link to the right, enter your amount and then select the “Update” link. Please be sure to enter amounts for all DLGF reviewed funds.
Please enter the 2014 proposed levy for each DLGF reviewed fund. To complete this section, click the “Edit” link on the right, enter the amount and then click “Update.”

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0101</td>
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<td>-100.00%</td>
<td>-100.00%</td>
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<tr>
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</table>

**Rate Tab**

The last section titled “Rate,” can be accessed by clicking on the third tab. This section requests the 2014 unit proposed tax rates. These are the same amounts as listed on the published column of line 17 of the Form 4B. To enter a rate, click the “Edit” link to the right, enter your amount and then select “Update.” Please be sure to enter amounts for all funds DLGF reviewed funds.

Please enter the 2014 proposed rate for each DLGF reviewed fund. To complete this section, click the “Edit” link on the right, enter the amount and then click “Update.”

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<th>Fund Code</th>
<th>Fund Name</th>
<th>2014 Proposed Rate</th>
<th>% Change, 2013-2014</th>
<th>Difference - State Growth Quotient</th>
<th>Difference - County Growth Quotient</th>
<th>Action</th>
</tr>
</thead>
<tbody>
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<td>+100.00%</td>
<td>+100.00%</td>
<td>Edit</td>
</tr>
<tr>
<td>0840</td>
<td>TOWNSHIP ASSISTANCE</td>
<td>0.0150</td>
<td>-100.00%</td>
<td>-100.00%</td>
<td>-100.00%</td>
<td>Edit</td>
</tr>
</tbody>
</table>

**Signing and Submitting the Form Electronically**

At the bottom of the CCRW, there is a box for you to use to place 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 code. This PIN code has been sent to the person with submission rights via email. You may contact the DLGF 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 click Sign and Submit, today’s date will automatically populate the date field and the form will be submitted.

Once you see the date populate the date field and the Sign and Submit button disappear, you have successfully signed and submitted the CCRW.

If you submit a form by mistake you may un-submit the form before the deadline, by clicking the red “Click here to unlock the form” button. You will need to ensure that the form is submitted by the deadline if you unlock it to make any corrections. If you do make a correction near the deadline, you may also want to notify your county auditor.
County Council Review

The County Council Review Worksheet will continue to be reviewed the same way it has been in the past. The only matter that has changed is the manner in which the worksheet is submitted. In the past, printed hard copies were mailed, emailed, faxed, or physically handed in by all units undergoing non-binding review. Now that units will submit the form electronically through Gateway, it will simply be a click away for the county to access. Any user with permissions to the county unit in Gateway may login and download each worksheet that was submitted.

First, navigate to the Unit Main Menu by logging into Gateway, clicking on “Budgets” and selecting the county unit. Similarly to the Certificate of Net Assessed Valuations, this worksheet will be accessed by selecting “County Council Review Output” underneath the County Specific Functions section on the right-hand side of the Unit Main Menu.

The county will see a table that lists of all the units that have submitted their County Council Review Worksheet. This gives the county a chance to reach out to those units that have not submitted prior to the deadline and offer a friendly reminder.
A unit’s County Council Review Form can be accessed by clicking on the “Click to View” link on the right hand side of the table. Please note that all the submitted County Council Review Worksheets can be pulled by clicking the “View All Submitted County Council Review Worksheets” button. The units’ Form 4B’s can also be pulled by selecting the Form 4B link. Please see the section below for assistance with printing.

**Viewing and Printing the Worksheets**

Once you have pulled the review worksheets or Form 4B’s and see them appear in a new window, click on the image 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 the forms into a PDF, Word, Excel, or many other file types. This allows you to personalize how you wish to have your data displayed.

If you wish to quickly and easily print off the form, you may want to click on “PDF” and then click the printer icon. Excel is also a popular option.

Please note that once the County Council Review Worksheets have been submitted, the remainder of the non-binding review process will continue as in previous years.

Congratulations! You have successfully submitted your County Council Review Worksheet. Please see our other user guides for assistance with other forms. If you have any questions, please email the Gateway inbox at gateway@dlgf.in.gov.