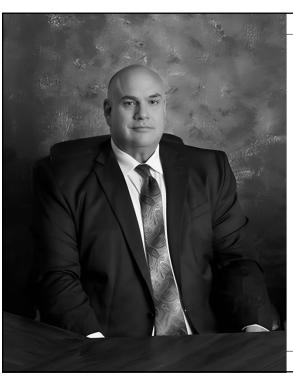
STATE BOARD OF ACCOUNTS

Gateway

2025 Clerk's Annual Conference

1



0000

PAUL D. JOYCE, CPA STATE EXAMINER

Indiana's State Examiner and the agency head for the State Board of Accounts, Paul Joyce coordinates and manages the post-audits and examinations of over 4,000 state and local governmental entities in Indiana.



Agenda

- Gateway
 - Training Certifications
 - Monthly & Annual Engagement Uploads
 - Encountering Issues?
- Subscribe to SBOA Communications

2025 Clerk's Annual Conference

3



IC 33-32-2-9 states:

- "(a) As used in this section, "training courses" refers to training courses related to the office of circuit court clerk that are compiled or developed by the Association of Indiana Counties and approved by the state board of accounts.
- (b) An individual elected to the office of circuit court clerk shall complete at least:
 - (1) fifteen (15) hours of training courses within one (1) year; and
 - (2) forty (40) hours of training courses within three (3) years;

after the individual is elected to the office of circuit court clerk.

- (c) An individual first elected to the office of circuit court clerk shall complete five (5) hours of newly elected official training courses before the individual first takes the office of circuit court clerk. A training course that an individual completes under this subsection shall be counted toward the individual's requirements under subsection (b).
- (d) An individual shall fulfill the training requirements established by subsection (b) for each term to which the individual is elected as circuit court clerk."



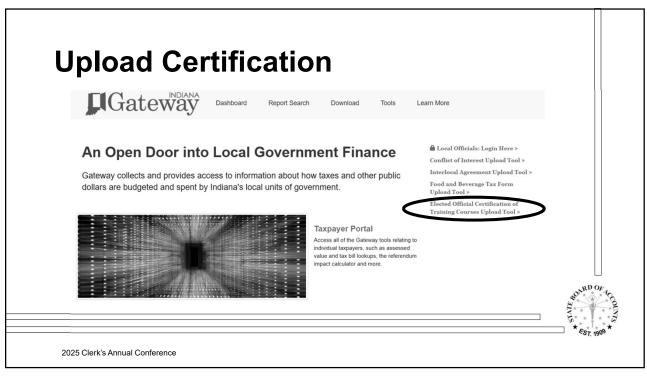
2025 Clerk's Annual Conference

5

IC 33-32-2-9 continued:

- "(e) The failure of an individual to complete the training required by this section does not prevent the individual from taking an office to which the individual was elected.
- (f) This subsection applies only to an individual appointed to fill a vacancy in the office of circuit court clerk. An individual described in this subsection may, but is not required to, take training courses required by subsection (b). If an individual described in this subsection takes a training course required by subsection (b) for an elected circuit court clerk, the county shall pay for the training course as if the individual had been an elected circuit court clerk.
- (g) An individual elected to the office of circuit court clerk shall certify completion of the requirements described in subsection (b) every year and file the certification with the state board of accounts in the same manner as the report required in IC 5-11-1-4(a)."





Upload Certification (Continued)

Elected Official Certification of Training Courses Upload Tool

The legal requirement for Elected Official Certification of Training Courses can be found throughout the Indiana Code in various sections depending on the position held.

 County Auditor
 IC 36-2-9-2.5

 County Treasurer
 IC 36-2-10-2.5

 County Recorder
 IC 36-2-11-2.5

 County Clerk
 IC 33-32-9

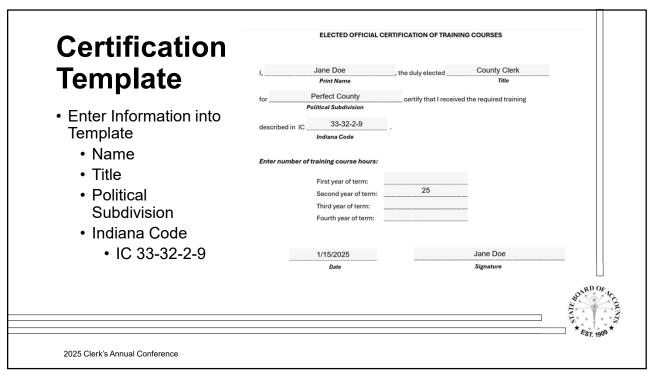
 City Clerk Treasurer / Controller
 IC 36-4-10-8

 Town Clerk Treasurer
 IC 36-5-6-10

over seled officials are required to certify completion of the training requirements set out for each office and file with the State Board of Accounts. Units may complete the form ETC.pdf and upload it using the tool below. If you have any questions regarding this law or disclosure, you should contact your attorney for legal advice.

NOTE: The filename should be formatted with only one period before the extension (ex., pdf). Neither IBRC nor SBOA review the uploads for content. It is the responsibility of the unit reporting Official Certificate of Training Courses to verify that the document that was submitted and is correct and complete.

2025 Clerk's Annual Conference



Upload Elected Official Certification of Training Courses Form

Name of person filing this disclosure:
Email address of person filing this disclosure:
Government Entity Name:

Select county

Select unit type

Select unit

Upload

Type the code from the image

9

Training Certification Recap

- Where to find the certification template?
 - There is a link in the Elected Official Certification of Training Courses Upload Tool.
- · What needs to be uploaded?
 - The completed certification template.
- Do I have to upload the support for my training?
 - No, just the certification template.
- · Who maintains he training hours?
 - · The official does.



2025 Clerk's Annual Conference

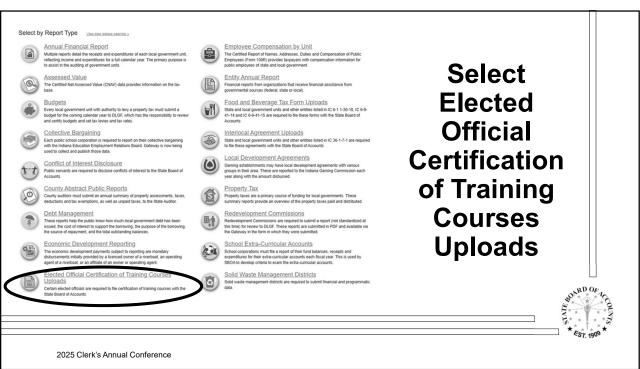
11

How to View Uploaded Certification?



Elected Official Certification of Training Courses Upload Tool

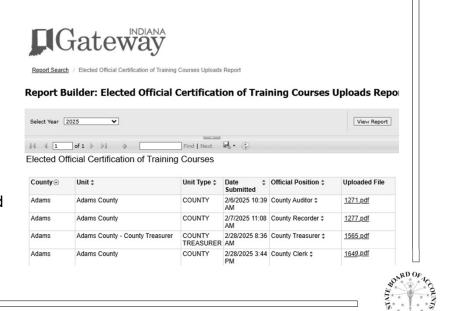








- · Click "View Report"
- To Open PDF select the link under "Uploaded File"



2025 Clerk's Annual Conference

15



Monthly & Annual Engagement Uploads

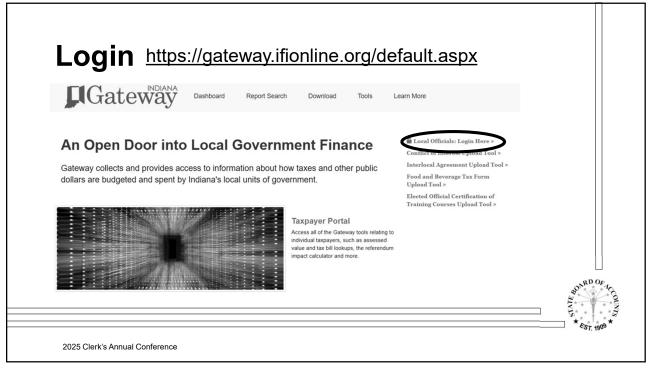
Getting Started

- Access:
 - Email Gateway@sboa.in.gov
 - Name
 - Position Elected & Unit Name
 - 1st Day of Term
 - · Outgoing Officials Name
 - Outgoing Officials Email (If known)
 - · Outgoing Officials last Day of Term



2025 Clerk's Annual Conference

17



Login (Continued)



- Enter your username and password.
- Don't have a username and password?
 - Contact the Helpdesk: gateway@sboa.in.gov

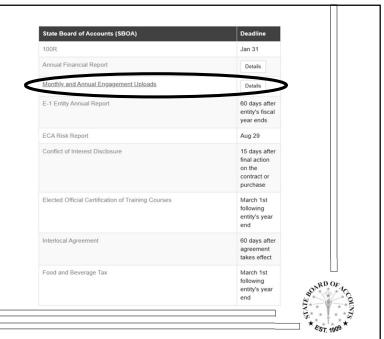


2025 Clerk's Annual Conference

19

Monthly & Annual Engagement Uploads Application

 Select the Monthly and Annual Engagement Uploads application from the SBOA applications list



Required Uploads - Monthly

- Monthly Bank Reconcilement
 - Document that shows how you balanced the bank statement balance to your ledger balance.
- · Monthly Bank Statement
 - Document received from your bank each month showing the beginning balance, each deposit, each check cleared, other activity, and ending balance.
- Outstanding Check List
 - List of checks that have been written but not yet cleared the bank account.
- · County Clerk, Form 46, Clerk's Cash Book and Daily Balance Record



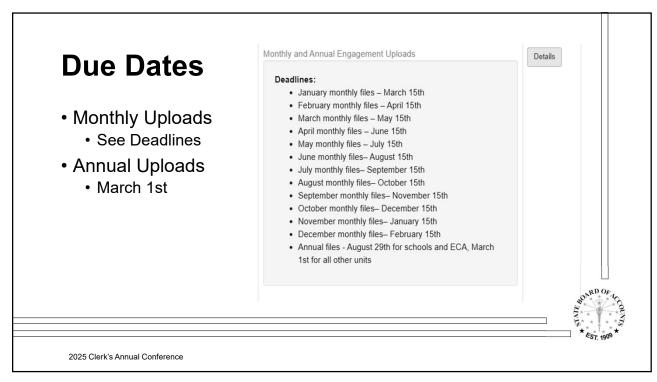
2025 Clerk's Annual Conference

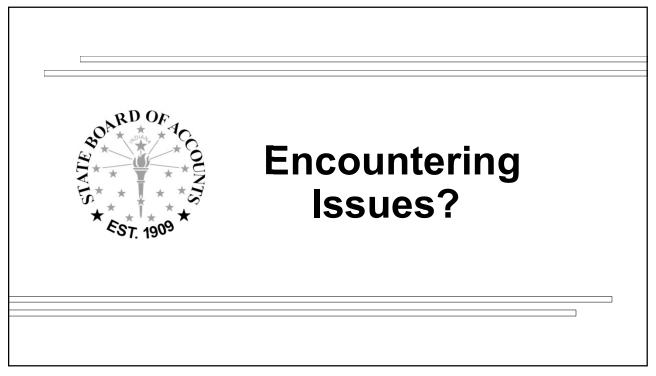
21

Required Uploads - Annually

- Court Trust Fund Subsidiary Detail
 - This is a subsidiary listing as of December 31 which should include the name, description, and account balance at year end.
 - The total should agree to the fund balance year end.
 - This would include the child support collections subsidiary detail.







Need Help?

- Technical Issue?
 - Contact the Gateway Helpdesk: gateway@sboa.in.gov
 - Issues with your password?
 - Forgot your username?
 - · File upload issues?
- Requirement Issue?
 - Contact the Director's: counties@sboa.in.gov
 - · What do I need to upload?
 - · When is it required to be uploaded?



2025 Clerk's Annual Conference

25

Resources

- User Guide Monthly and Annual Engagement Uploads: https://gateway.ifionline.org/userguides/engagementguide
- State Examiner Directive 2018-1: https://www.in.gov/sboa/library/state-examiner-directives2/#2018



2025 Clerk's Annual Conference



27

Subscriptions

- Go to www.in.gov/sboa/
- Scroll down to find "Subscribe for e-mail updates"



Selecthttps://cloud.subscription.in.gov/signup?depid=54600
 6796



2025 Clerk's Annual Conference

THANK YOU

Government Technical Assistance & Compliance (GTAC) Directors

Ricci Hofherr, CPA Staci Byrns, CFE



counties@sboa.in.gov



(317)232-2512



www.sboa.in.gov

