

To: Assessment Directors, Accountant/Auditors, Finance Directors, City/Town Clerks

DLS Gateway Tips

9/08/2008

DE-1, Votes, and Levy Limit

Completing the DE-1 and the Levy Limit form when a community has debt exclusions is a collaborative task involving the Financial Officer, Clerk, your Bureau of Accounts advisor, and DLS's Municipal Databank staff. Because attaching the correct vote recorded in the DOR database to the correct debt exclusion in the Recap could be difficult for many local officials, the DLS Gateway system has DLS staff complete this step, as they have done behind the scenes in years past.

The current process is

1. *The Clerk provides specimen ballots with certification election results for all Proposition 2 1/2 questions voted this year to DLS.*
2. *DLS Municipal Databank staff enters results from all Proposition 2 ½ ballot questions (wins and losses).*
3. *The Financial Officer enters vote details in the DE-1.*
4. *The BOA Advisor attaches the vote(s) from a list in the Municipal Databank.*
5. *Local officials complete the Tax Rate Recap which can have information from steps 1 through 3 above.*

Questions? – Contact your Bureau of Accounts representative.

Preliminary Levy Limit Report

Because preliminary levy limit information is now calculated dynamically from the database when some communities may not have decided overrides or debt exclusions, we have moved the Preliminary Levy Limit Report from the public-facing landing page to the Tax Rate Reports available only to logged-in users. A number of communities suggested this move.

LA4 Error Messages

Have you filled out the LA4 and clicked the Submit button only to see **"Some Business Checks have failed. Do you want to correct them prior to submission?"** Most assessors can safely ignore this message and respond **No**, they do not want to correct them. Then another prompt will appear **"This will Lock the Data and Officially Submit the Data to DLS. Do you want to proceed?"** If your data are correct, respond **Yes** and proceed. (DLS Gateway retains error messages from the earlier DLS-only system intended for DLS analysts who would be expecting a complete package of LA forms. We are working on deleting or changing these and other error messages, but it will take some time to do it right.)

Signing on Behalf of Others

Can one official sign forms on behalf of others? The answer is Yes in order to get a form submitted and under review, but the community must still ensure that statutory requirements are met with either electronic or hardcopy signatures. The Comment box is provided next to each signature line so

someone signing on behalf of others can explain their authorization and how they are meeting legal requirements, e.g. a majority of the board's actual signatures on a printout will be faxed.

DLS Gateway Tutorial Sessions

Over 120 communities requested DLS Gateway tutorial sessions in advance of the FY09 Tax Rate and Schedule A season. These sessions cover those aspects of submitting directly on-line that differ from Excel-based methods. Powerpoint slides outlining the presentation are at <http://www.mass.gov/dor/docs/dls/it/gatewaytutorials.pps>. DLS is concluding these presentations at the end of September, as Tax Rate setting season gets busier for local officials and DLS staff.

DLS Gateway Help and Support

Who do you call when you need help? If your problem or question is on the computer-technical side, DLS IT Support is at 617-626-2350 and the group email address is DLSITGroup@dor.state.ma.us. If the issue is on the assessment or accounting side, contact the BLA or BOA representatives you would ordinarily consult. Not sure on which side your issue lies? Contact either IT or BLA/BOA, and DLS will refer it internally to the right person.