Adding and Editing Officials in DLS Gateway's Local Officials Directory

https://dlsgateway.dor.state.ma.us/gateway/Login

Support: DLSGateway@dor.state.ma.us

Entering a new official using ⟦Add Person/Position Details⟧

Directory
Person Information

ⓘ DIR_035 | Add a new official by filling in the form below, or click an official's name to edit that person's data. Address and phone information has been pre-populated for the selected department

HAWLEY - 129

Jurisdiction Type [City/Town] Jurisdiction [Hawley - 129] Department [Accountant/Auditor] [Add Person/Position Details]

Person Information
Position: Town Accountant
Functional Role: Accountant/Auditor
Salutation: --Select a Salutation--
First Name:
Middle Name:
Last Name:
Suffix:
Department Head: ● Yes ○ No
Is Active: ● Yes ○ No

Official Address Information
Address 1: Town Hall
Address 2: 8 Pudding Hollow Rd
Address 3:
City: Hawley
State: MA Zip 01339 -

Official Phone Information
Main Phone: Ext
Alt Phone: Ext
Fax:
Mobile:

Official Website and Email Information
Web Site (click here to launch)
www.townofhawley.com
Official / Unofficial ● Official ○ Unofficial
Email (click here to send)

User Defined Fields (for DLS only)
User Defined Field 1:
User Defined Field 2:
User Defined Field 3:
User Defined Field 4:
Save

Elected / Term Information
Elected / Appointed Info ○ Elected ● Appointed
Election Date
--Select Election Date--
Appointed Date
01/03/2022
Term Expires On Date

Personal Address Information
Address 1:
Address 2:
Address 3:
City:
State: Zip -

Personal Phone Information
Main Phone: Ext
Alt Phone: Ext
Fax:
Mobile:

Personal Email Information
Email (click here to send)

Personal Disclosure Information
Disclose Personal Info ○ Yes ● No

1 Person Information
Enter data in these fields:
- Position: enter the person's job title
- First, Middle and Last Name: enter the person's first and last name, and include a middle name if applicable (it's optional)
- Functional Role: if this official is the only person filling a key functional role, choose that role from the list
- Department Head: if this official is a department head, choose Yes
Active is set to Yes by default for a new official.
Functional Role, Salutation, Middle Name, and Suffix are optional.

2 "Official" Information sections
This data is automatically filled from the Department record. Review the information and edit the phone numbers and website if necessary.
- Email: enter the person's official email address
This is important, because Gateway notifications depend on a valid official email address.

3 Elected/Term Information
If the official is elected or appointed, choose the appropriate radio button and enter the applicable date(s).
Election Date: if the correct election date does not appear in the list, the clerk must enter it in the Election and Meeting Dates Screen.
(This data is vitally important for officials in the Assessors department.)

4 Personal Information
All data in this section is optional. This data will be shown publicly if *Yes* is selected in the Personal Disclosure section. *No* is the default.

5 Save
When all data has been entered, click the Save button. Note any errors at the top of the screen; they must be corrected before leaving the screen in order to save the new official's data.

Replacing an official by typing over an existing record

1 Person Information

Change data in these fields:
- First, Middle and Last Name: enter the person's first and last name, and include middle name if applicable
- Functional Role: if this official is the only person filling a key functional role, choose that role from the list
- Department Head: if this official is a department head, choose Yes

Active should be Yes for an official currently serving the community. Review all fields to make sure all data applies to the new official!

2 "Official" Information sections

Review the information and edit the phone numbers and website if necessary.
- Email: enter the new person's official email address

Gateway notifications depend on a valid official email address.

3 Elected/Term Information

If the official is elected or appointed, choose the appropriate radio button and enter the applicable date(s).

Election Date: if the correct election date does not appear in the list, the clerk must enter it in the Election and Meeting Dates Screen

This data is vitally important for officials in the Assessors department

4 Personal Information

All data in this section is optional. If entering data here, be sure to also make a selection (Yes or No) in the Personal Disclosure section.

5 Save

When all data has been entered, click the Save button.
When asked if this is a new official or a correction, click Add New.
Note any errors at the top of the screen; they must be corrected before leaving the screen in order to save the new official's data.

Correcting data in an official's Directory record

1 Change data in the applicable fields.
- When changing an official's <u>name</u>, Gateway will ask if this is a new official or a correction when you save.
- If this is only a correction and not a new person, **make sure you click the button labeled "Correct",** which will correct the data and make no other changes to the person's account.

2 **Save**
When all data has been entered, click the Save button. **When asked if this is a new official or a correction, click Correct**. Note any errors at the top of the screen; they must be corrected before leaving the screen in order to save any changes to the official's data.

Choosing "Correct" is the right choice when you're correcting something wrong in an existing official's data. If you're replacing a former official with a new person, "Add New" is the correct choice, to ensure the new official receives a new Gateway account.