

Division of Local Services Gateway

Quick Tips Series – Clerks

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

DIR_035 Add a new official by filling in the form and phone information has been pre-populated for	below, or click an official's name to edit that person's data. Add the selected department	ress	
HAWLEY - 129			
Jurisdiction Type City/Town 🗸 Ju	risdiction Hawley - 129 V Depart	ment Accountant/Auditor	×
Person Information	Elected / Term Information		
Position Town Accountant	Elected / Appointed Info O Elected Appointed		
Functional Role Accountant/Auditor	Election Date		
SalutationSelect a Salutation V	Select Election Date 💙	(3)	
First Name	Appointed Date		
Middle Name	Term Evolution On Date		
Last Name			
Suffix			
Department Head Yes No	Personal Address Information Address 1		
Is Active	Address 2	4	
	Address 2		
Official Address Information		_	
Address 1 Town Hall			
Address 2 8 Pudding Hollow Rd	State Zip -		
Address 3	Personal Phone Information		
City Hawley	Main Phone Ext		
State MA Zip 01339 -	Alt Phone Ext		
Official Phone Information	Mahila		
Main Phone Ext			
Alt Phone Ext	Personal Email Information		
Fax	Email (click here to send)		
Mobile			
	Personal Disclosure Information		
Official Website and Email Information	Disclose Personal Info OYes No		
Web Site (click here to launch)			
User Defined Fields (for DLS only)			
User Defined Field 1			
User Defined Field 2			
User Defined Field 3			
User Defined Field 4			

Entering a new official using Add Person/Position Details



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Position Details

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.

"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.

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.*)



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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.

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.

Vinitation reprint Vinitation reprint	Directory Person Information	
Person Information Harded / Term Information Processes Red Sector Sector Red Processes Red Sector Sector Red Processes Red Sector Sector Red Processes Red Processes Red Proceseses Red Processes Red	Jurisdiction Type City/Town	urisdiction Hawley - 129 V Department Accountant/Auditor V Add Person/Position Details
Suffice Present Made Department Made Vis % % Stative % % % % Backers 1 Address 2 Address 2 Address 3 Cipy Water 1 Address 2 Backers 1 Cipy State Cipy State State 2 pp (333) Cipy Main State Departmention Nam Phone Ext Fax Presonal Edomation Nam Phone Ext Fax Presonal Edomation Nam Phone Ext Fax Presonal End/Information Number Circle Enal Information Number Circle Presonal Info Presonal Enal Information Decise Preson Web Endined Field Side (Stro Dis only) Nume Pointed Field 1 User Defined Field I User Defined Field I User Defined Field I New Pointed Field 1 User Defined Field I New Pointed Field 1 User Defined Field I New Pointed Field 1 User Defined Field I New Pointed Vise 1 (Anteries 1 e on existing official to Dire	Person Information Position Assistant Accountant Functional Role Select a Functional Role Salutation Select a Salutation First Name	Elected / Term Information Elected / Appointed Info O Elected Appointed Election Date Select Election Date V Appointed Date [01/10/2022 Term Expires On Date
Image: Address 1 information Address 2 Address 3 Civy Sate Civy Sate Image: Civy	Suffix Department Head O Yes No Is Active Yes No	Personal Address Information Address 1 Address 2 Address 3
State MA State MA Zip (2232) Alt Phone Ext Alt Phone Ext Fax Nobile Personal Email Information Enail (click here to sand) Official Website and Email Information Eva: Personal Disclosure Information Disclose Personal Info Web Site (click here to sand) Official / Unofficial & Official Outofficial Email (click here to sand) User Defined Field 1 User Defined Field 3 User Defined Field 4 Save Person Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official? Click 'Add New' to inactivate the previous official and activate the new official. Click 'Correcting or adding data to an existing official's record. Click 'CANCEL' to disca all changes.	Official Address I formation Address 1 Town Hall Address 2 8 Pudding Hollow Rd Address 3 City Houday	City
Alt Phone Ext Fax Mobile Official Website and Email Information Mobile Personal Disclosure Information Web Site (dick here to send) Dicidase Personal Info OYes ® No Veb Site (dick here to send) User Defined Fields (for DLS only) User Defined Field 1 User Defined Field 3 User Defined Field 4 Save Person Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official? Click 'Add New' to inactivate the previous official and activate the new official. Click 'CANCEL' to disca all changes.	State MA Zip 01339 - Official Phone Information Main Phone Ext	Plain Prone Ext Alt Phone Ext Fax Mobile
Web Site (dick here to sund) Www.townofhavley.com Official / Unofficial @ Official @ Official Email (dick here to send) User Defined Field 1 User Defined Field 2 User Defined Field 3 User Defined Field 4 Save Person Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official? Click 'Add New' to inactivate the previous official and activate the new official. Click 'Correctify or adding data to an existing official's record. Click 'CANCEL' to disca all changes.	Alt Phone Ext Fax	Personal Email Information Email (click here to send) Personal Disclosure Information Disclosure Information
User Defined Fields (for DLS only) User Defined Field 1 User Defined Field 3 User Defined Field 4 Save Defined Field 4 Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official? Click 'Add New' to inactivate the previous official and activate the new official. Click 'CANCEL' to discar all changes.	Web Site (click here to launch) [www.townofhawley.com Official / Unofficial @ Official O Unofficial Email (click here to send) [www.townofnawley.com]	
User Defined Field 4 Save Defined Field 4 Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official? Click 'Add New' to inactivate the previous official and activate the new official. Click 'Corre if you are correcting or adding data to an existing official's record. Click 'CANCEL' to discar all changes.	User Defined Fields (for DLS only) User Defined Field 1 User Defined Field 2 User Defined Field 3	Save Berron
Click 'Add New' to inactivate the previous official and activate the new official. Click 'Correctify you are correcting or adding data to an existing official's record. Click 'CANCEL' to discar all changes.	User Defined Field 4 Save Delete	Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official?
	5	Click 'Add New' to inactivate the previous official and activate the new official. Click 'Con if you are correcting or adding data to an existing official's record. Click 'CANCEL' to disc all changes.

Replacing an official by typing over an existing record



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!

"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.

Electe

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*



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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.

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.

Jurisdiction Type	City/Town 🗸	Jurisdiction Hawley - 129	on/Po
Person Informat	ion	Flected / Term Information	
Position	Assistant Accountant	Flected / Appointed Info O Elected Appointed	
Functional Role	Select a Functional Role	Election Date Select Election Date	
Salutation	Select a Salutation 🗙		
First Name		01/10/2022	
Middle Name		Term Expires On Date	
Last Name			
Last Hame			
Suffix		Personal Address Information	
Department Head	🔾 Yes 💿 No	Address 1	
Is Active	● Yes 🔿 No	Address 2	
		Address 3	
Official Address	Information		
Address 1 Town H	fall		
Address 2 8 Pudd	ing Hollow Rd	State Zip -	
Address 3			
		Personal Phone Information	
City Hawley		Main Phone Ext	
State MA	Zip 01339 -	Alt Phone Ext	
		Fax	
Official Phone In	formation	Mobile	
Main Phone	3 Ext		
Alt Phone	Ext	Personal Email Information	
Fax 4		Email (click here to send)	
Mobile			
		Personal Disclosure Information	
Official Website	and Email Information	Disclose Personal Info OYes No	
Web Site (click he	ere to launch)		
www.townofhawley.	.com		
Official / Unofficia	al 💿 Official 🔾 Unofficial		
Email (click here t	to send)		
User Defined Field	Ids (for DLS only)		
oser benned held			
User Detined Field	12		
User Defined Field	13		
User Defined Field	14		
Save Delete			
_	$\left(\begin{array}{c} 2 \end{array} \right)$		

Director

Correcting data in an official's Directory record



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.



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.

Save Person	×				
Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official?					
Click 'Add New' to inactivate the previous official and activate the new official. Click 'Correct' if you are correcting or adding data to an existing official's record. Click 'CANCEL' to discard all changes.					
Ac	dd New Correct Cancel				

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.