

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 01/03/2022		
Middle Name	Term Expires On Date		
Last Name			
Suffix			
Department Head Yes No	Personal Address Information Address 1		
Is Active Yes No	Address 2	4	
	Address 3		
Official Address Information	City	_	
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		
	Fax		
Official Phone Information	Mobile		
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) 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			

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.

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Vertexter type Current v horderties	Directory Person Information HAWLEY - 129	
Protein Final Advance Information Bitsel Advances Second Advances Information Bitsel Advances Final Advances Information Bitsel Advances Final Advances Information Bitsel Advances Final Advances Information Bitsel Advances Information Advances Bitsel Advances Information Advances Bitsel Advances Information Advances Bitsel Advances Information Advances Advances Final Advances Information Advances Final Advances Information Advances Final Advances Information Advances Final Advances Information Madrees 1		urisdiction Hawley - 129 V Department Accountant/Auditor V Add Person/Position Details
Personal Address I official I	Position Assistant Accountant Functional Role Select a Functional Role ✓ Salutation Select a Salutation ✓ First Name Middle Name	Elected / Appointed Info O Elected Appointed Election DateSelect Election Date 01/10/2022
Address 1 born Hall	Department Head Ves No Is Active Yes No	Address 1 Address 2
State AL Plone Dficial Phone Information Nain Phone Ext Res Res <tr< td=""><td>Address 1 Town Hall Address 2 8 Pudding Hollow Rd Address 3 </td><td>State Zip - 4</td></tr<>	Address 1 Town Hall Address 2 8 Pudding Hollow Rd Address 3	State Zip - 4
Fax Personal Email Information Mobile Personal Email Information Official Website and Email Information Personal Disclosure Information Web Site (dick here to launch) Personal Info O'Yes @ No Web Site (dick here to sand) Disclose Personal Info O'Yes @ No Web Site (dick here to sand) Personal Email (dick here to sand) Web Control Info O'Yes @ No Personal Info O'Yes @ No User Defined Field 1 Disclose Personal User Defined Field 2 Disclose Personal User Defined Field 3 Click Years On Mobile Are you adding a newly elected or appointed official to Directory, or are you correcting the data of an existing official? Click Yadd New' to inactivate the previous official and activate the new official. Click 'CANCEL' to discar all changes.	State MA Zip 01339 Official Phone Information Main Phone Ext	Alt Phone Ext
Web Site (dick here to launch) Www.townofhavley.com Official / Unofficial Email (dick here to send) Web Site (dick here to send) Web Set Cefined Fields (for DLS only) 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 'CANCEL' to disca all changes.	Fax for any test	Email (click here to send) Personal Disclosure Information
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 discar all changes.	Web Site (click here to launch) www.townofhawley.com Official / Unofficial @ Official \ Unofficial	
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 Field 1 User Defined Field 2	Save Berron
5 if you are correcting or adding data to an existing official's record. Click 'CANCEL' to discar all changes.		Are you adding a newly elected or appointed official to Directory, or are you correcting to data of an existing official?
Add New Correct Can	5	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.

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	Department Accountant/Auditor	Add Person/Po
Person Information	Elected / Term Information		
Position Assistant Accountar	t Elected / Appointed Info O Elected	Appointed	
Functional RoleSelect a Function	al Role V Election Date		
SalutationSelect a Salutatio	Select Election Date 🗙		
	Appointed Date		
First Name	01/10/2022		
Middle Name	Term Expires On Date		
Last Name			
Suffix			
Department Head O Yes No	Personal Address Information Address 1		
Is Active Yes No			
Is Active	Address 2		
Official Address Information	Address 3		
Address 1 Town Hall	City		
	State Zip	·	
Address 2 8 Pudding Hollow Rd			
Address 3	Personal Phone Information		
City Hawley	Main Phone Ext		
State MA Zip 01339	Alt Phone Ext		
	Fax		
Official Phone Information	Mobile		
Main Phone	Pioble		
Alt Phone Ext	Personal Email Information		
Fax 4	Email (click here to send)		
Mobile			
	Personal Disclosure Information		
Official Website and Email Inform			
Web Site (click here to launch)			
www.townofhawley.com			
Official / Unofficial 💿 Official 🔾 Uno	fficial		
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 Delete			

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.				
Add 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.