



DLS

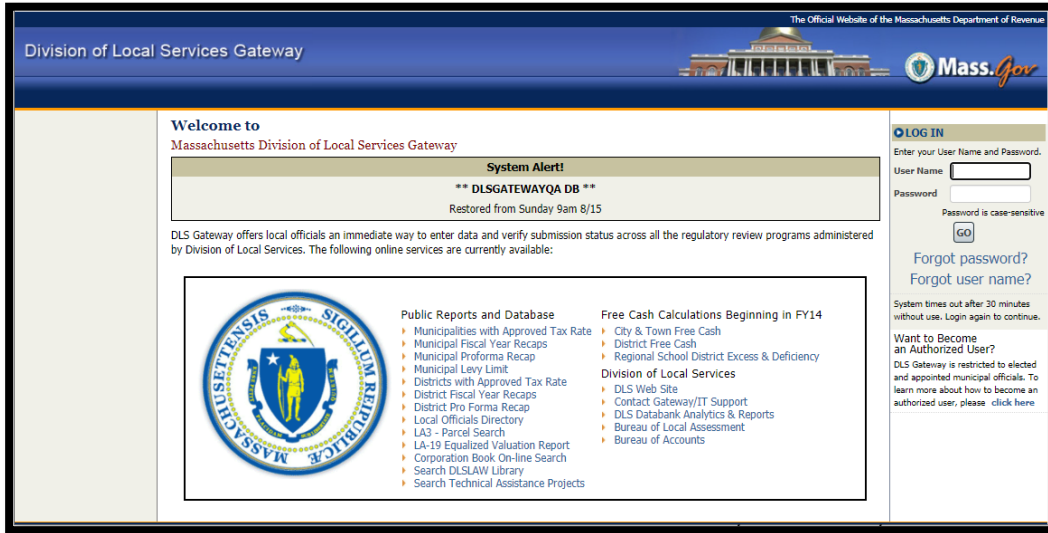
DIVISION OF LOCAL SERVICES
MA DEPARTMENT OF REVENUE



Entering Municipal Audit Data

A guide to using DLS Gateway for municipal audit firms

July 2021



Log into DLS Gateway:

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

Enter the user name and the temporary password given to you by DLS

Click Go, or press the Enter key on your keyboard

Need a Gateway account?

How to contact DLS Gateway Support

For the fastest response during the COVID-19 emergency, please contact us by email:

DLSGateway@dor.state.ma.us

All DLS Gateway staff are working remotely and our phones are not continuously monitored. Messages left on the Gateway support line will be returned as soon as possible.

<https://www.mass.gov/service-details/dls-gateway-help-system>

Your user name is not case-sensitive (you can type it using either upper or lower-case letters)

Passwords are case-sensitive, so be sure to enter it exactly as shown on your welcome email

Division of Local Services Gateway

My Profile

User Profile Information

You have obtained a temporary password, please change it now to continue using the system.

Jurisdiction	Hirbour & Haynes, PC	Position	Auditor
Person	Mark Spellman	Department	Auditing
User Name	SPELLMANS	Email ID	spellmans@hirbourhaynes
Telephone	508-476-8933	Administrators	

Password Settings

Current Password		Password Security Question	What is your city of birth?
New Password		Answer	
Re-enter Password			

* Password must be between 8 and 20 characters, have 1 upper case letter, 1 lower case letter, 1 number and 1 special character (e.g. *\$+?!%/@#)

Save

First login: Set up a Profile

Enter your current password, then enter a new password and confirm it under Password Settings

Choose a security question from the list and enter an Answer

Click Save when you have entered all Profile data

Password Security Question	What is your city of birth?
Answer	

ase letter, 1 lower case l

- What is your city of birth?
- What is your mother's maiden name?
- What is your favorite movie?
- What is your favorite food?
- What is your pet's name?
- What is your favorite sport?
- Who is your favorite actor?
- What is your favorite vacation destination?
- What food do you hate most?

Having a security question and answer in the system will give you the option of resetting your own password using the "Forgot Password?" option on the login screen

During regular business hours, DLS Gateway Support can always assist you with password or account issues:

DLSGateway@dor.state.ma.us

Division of Local Services Gateway

[Misc Forms](#) | [Directory](#)

Welcome to the DLS Gateway suite of applications for local officials.

You are identified as :

Thomas Brady

CliftonLarsonAllen LLP

Please choose the appropriate item from the menu bar above to continue.

Please contact your System Administrator or DLS if you want to update the information.

What you can do in DLS Gateway

Municipal auditors have
access to two Gateway
modules:

Directory and Misc Forms

Click the module name to
access the forms in each
module

Directory lets you view contact information for officials associated with cities, towns, special purpose districts and regional school districts

Division of Local Services Gateway

Misc Forms **Directory** Security

Local Official Directory

Search

Add/Edit Person/Position

Directory

Search

Jurisdiction Types: City/Town, County, School District, Utilities District

Jurisdictions: Abby Kelly Foster Regional, Abington, Academy Of The Pacific Rim, Acton, Acton Boxborough, Acton Water Supply, Acushnet, Adams, Adams Fire, Advanced Math & Science

Departments: Accountant/Auditor, Airports, Aldermen, Ambulance Service, Animal Control, Assessors, Auditing, Budgeting, Building Inspector, Celebrations

Functional Roles: Accountant/Auditor, Alderman Chair, Assessment Director, Assessor Chairman, Board Of Health Chair, Budget Director, Building Inspector, CEO/Manager/Administr., City Clerk/Town Clerk, City Council President

Show Associated Jurisdiction(s) ☐

Position: Last Name: First Name: Middle Name:

Show Department Heads only ☐ Inactive Persons only ☐

Search Clear Search Criteria Reset Sort

Sort Order : Jurisdiction Asc, Department Asc

Show 50 entries (Number of Records found: 14317)

Jurisdiction	Department	Functional Role	Position	Official's Name	Phone	Email	Active Person
Abby Kelly Foster Regional	School Administration		Principal	Doris Schroeder		bhaas@akfcs.org	Y
Abington	Accountant/Auditor	Accountant/Auditor	Town Accountant	Suzanne Moquin	781-982-2100	samoquin@abingtonma.gov	Y
Abington	Assessors		Assessing Clerk	Jodie Hurst	781-982-2107	jhurst@abingtonma.gov	Y
Abington	Assessors	Assessor Chairman	Board of Assessors	Lawrence Keough	781-982-2107		Y
Abington	Assessors		Board of Assessors	Ann Welch	781-982-2107		Y
Abington	Assessors	Assessment Director	Assessor	Jolanta Briffett	781-982-2107	jbriffett@abingtonma.gov	Y
Abington	Assessors		Board of Assessors	Ann Kent	781-982-2107	jbriffett@abingtonma.gov	Y
Abington	Assessors		Assessing Clerk	Joseph Shea	781-982-2107	jshea@abingtonma.gov	Y
Abington	Building Inspector	Building Inspector		Marshall Adams	781-982-2105		Y
Abington	City/Town Clerk	City Clerk/Town Clerk	Town Clerk	Leanne M. Adams	781-982-2112	lmadams@abingtonma.gov	Y
Abington	City/Town Manager	CEO/Manager/Administr.	Town Manager	Scott Lambiase	781-982-2100	slambiase@abingtonma.gov	Y
Abington	City/Town Planner, Planning Board	Planning Board Chair	Planning Board Chairman	Wayne P. Smith	781-982-0069		Y

Use the filters to select a specific community or district, or to narrow the results to specific departments or positions (“functional role”)

The “Misc Forms” module contains two forms accessible by audit firm users: Audited Financial Data and Management Letter

These forms are used to submit information to the DLS Bureau of Accounts

Note: The Misc Forms module landing page contains information for all available forms, most of which audit firms do not have access to



Municipal Audit Reports
Audited Financial Data
Management Letter

Division Local

Misc Forms Directory

Audit Report - DLS Only
Audited Financial Data
Management Letter

Misc Forms
Miscellaneous Forms

FAQ's

Question
► I can't find the Year End Accounting Forms! Where are they?
► What is the parcel value limit for Land of Low Value in calendar 2021?
► When should the Motor Vehicle Excise form be submitted?
► Where can I find IGRs and Bulletins from DLS's Municipal Finance Law Bureau?
► Whom do I contact with any issues relating to the Paralegic, Veterans, or MDM-1 Forms?
► When entering Veterans Clause 22(a-f) do I need to include the names on the Veterans Exemptions Form?
► How do I remove or update a signature?

COVID-19 Municipal Finance Forms

NEW FORMS: [DLS Bulletins 2020-4, 5 and 6](#) mention new Gateway forms for COVID-19-related authorizations. These forms are listed under the new submodule "Deficit Spending Approval" on the left of the screen. If you are an accounting officer, finance director or a city, town or district clerk and do not see these forms, please contact DLS Gateway Support by emailing dlsgateway@dor.state.ma.us.

Click here for a [sample town clerk's certificate of vote](#). This document is required for submission of the Deficit Spending Approval form.

Click here to find the name of the [BOA advisor assigned to your city or town for FY 2021](#). Click here to find the name of the [BOA advisor assigned to your district for FY 2021](#). Contact information (email and phone number) for your community's advisor is available on [DLS's Staff Directory webpage](#).

CP-1 Community Preservation Surcharge Report

Form is due annually on September 15th, this report is used to calculate the CPA state match. The match can't be calculated until all forms from community's participating in the program have been submitted.

- Enter **surcharge %** as 3.0 not .03 (using the local surcharge percentage adopted)
- Under **Prior Year Surcharge Abatements/Exemptions** this should only reflect prior year abatements/exemptions that were not captured on the form last year (typically caused by a late tax rate submission or appellate court case)
- **Additional Revenue Appropriated to CPF** this field is only used for a community that voted a "blended" CPA where a lower percentage was adopted and funds from the general fund are appropriated to supplement the CPA up to 3%. This would also make the community eligible for the second and third round distributions of CPA matching funds.
- Form requires signature from both the Assessors and Accounting Officer. Coordinate who is going to click the submit button, if the form is not submitted it is not considered received.

Questions on completing the form: email atabank@dor.state.ma.us

Property Tax Exemptions

Property Tax Exemption Reimbursement Form

****The Veterans Exemption form must be in SUBMIT state to edit the MDM-1 Form****

- You must submit the forms in this order: Paralegic Form (if any), Veterans Exemption Form, then MDM-1 Form.
- Do not enter data, sign or submit the Paralegic form if you have never granted paralegic exemptions.
- When entering tax deferrals on the MDM-1 form, only include the taxes deferred - do not include other charges including **CPA**.
- Clause 17E is still reported under the previous clause adopted (clause 17E allows you to increase the exemption amount); the same is true with clause 41D.

Help | My Profile | Logout
Logged In: Mark Spellman
Last Logged In: N/A

To upload an audit report and submit it to the Bureau of Accounts:

- Click **Audited Financial Data** on the left side of the screen under Municipal Audit Reports
- Select the Jurisdiction Type, Jurisdiction and the report's Fiscal Year from the drop-down menus, then click Go
- All jurisdictions are listed in the menu, but you can only access forms for the jurisdictions your firm is associated with

The screenshot displays the 'Division of Local Services Gateway' interface. On the left, a sidebar contains a menu with 'Misc Forms' and 'Directory'. Under 'Misc Forms', 'Municipal Audit Reports' is expanded, showing 'Audited Financial Data' (highlighted with an orange box) and 'Management Letter'. The main content area is titled 'Audited Financial Data' and 'Manage Audited Financial Data'. A yellow message box states: 'AFD_004 | Your firm is not currently associated with the selected jurisdiction; contact DLS for assistance.' Below this, the text 'ABINGTON - 001 2021' is displayed. At the bottom, there are three dropdown menus: 'Jurisdiction Type' (set to 'City/Town'), 'Jurisdiction' (set to 'Abington - 001'), and 'Fiscal Year' (set to '2021'). A 'Go' button is located to the right of the 'Fiscal Year' dropdown. The footer of the page reads '©2021 Commonwealth of Massachusetts DLS-GWWEBQA'.

If you can't access a client community's form, contact DLS Gateway Support for assistance (dlsgateway@dor.state.ma.us)

Audited Financial Data
Manage Audited Financial Data
Status: NO STATUS FOUND
[WORCESTER - 348 2021](#)

Jurisdiction Type Jurisdiction Fiscal Year

Audit Firm BOA Advisor Amy Handfield

Opinion Type Report Date

Government Funds Balance Sheet

Total Fund Balance

Unassigned Fund Balance

☐ Self-insured Health Insurance

Statement of Net Position: Proprietary Funds

Internal Service Fund: Net Position Fund Balance

Footnote: Long Term Debt

Note Number

	General Fund	Enterprise Fund
TOTAL Long Term Debt Outstanding At Year End	<input type="text" value="0"/>	<input type="text" value="0"/>
Inside Debt Limit Outstanding	<input type="text" value="0"/>	<input type="text" value="0"/>
Outside Debt Limit Outstanding	<input type="text" value="0"/>	<input type="text" value="0"/>
Debt Service Expenditure	<input type="text" value="0"/>	<input type="text" value="0"/>

Comments - [add comment](#)

Comments
No comments to display.

Current Documents - [upload new documents](#)

Name	Action
No documents to display.	

Signatures

Audit Firm Representative

☐ Check to add signature

Bureau of Accounts Field Representative

☐ Check to add signature

Signatures

Audit Firm Representative

☐ Check to add signature

Bureau of Accounts Field Representative

☐ Check to add signature

Apply Signature

John Smith, Auditor , CliftonLarsonAllen LLP | 7/15/2021 1:35 PM

Are you sure you want to sign this form?

Comment

Required Data:

Select an Opinion Type:

- Adverse
- Disclaimer
- Qualified
- Unqualified

Enter the report date (MM/DD/YYYY)

Upload at least one document
(maximum file size is 24.9 MB)

Check the signature checkbox under
Audit Firm Representative, then in the
pop-up Signature box, click Sign
(entering a comment is optional)

Click **Save** to save the current data

Green fields are “locked” and are not
accessible to audit firm users (they
are for DLS use only)

When the upload and data entry are
complete, click **Submit**

Management Letter

Submit Management Letter Details

Status: NO STATUS FOUND

WORCESTER - 348 2021

Jurisdiction Type Jurisdiction Fiscal Year

Audit Firm Name: BOA Advisor: Amy Handfield

Management Letter Date

No. Prior Year Comments Unresolved

No. Current Year Comments

Delete	Deficiency Type	Description	Prior Year Issue
<input type="checkbox"/>	--Select a Deficiency Type Code--		<input type="checkbox"/>

Comments - [add comment](#)

Comments
No comments to display.

Current Documents - [upload new documents](#)

Name	Action
No documents to display.	

Signatures

Audit Firm Representative

☐ Check to add signature

Bureau of Accounts Field Representative

☐ Check to add signature

Why are my buttons disabled?

Management Letters

If submitting a management letter to the Bureau of Accounts:

- Click **Management Letter** on the left side of the screen under Municipal Audit Reports
- Enter the letter date
- Upload at least one file
- Click Save

When the data is complete, sign and submit the form

A signature and at least one document are required for submission of both forms

ML_001 | At least 1 document is required in order to submit this form.
Audit Firm Representative : At least 1 signature/s are required for this group.

DLS Gateway Support

By email (fastest response)

DLSGateway@dor.state.ma.us

Support staff will respond Monday through Friday, 7 AM to 4:30 PM except state holidays

By phone

[Call DLS Gateway Support at \(617\) 626-2350](tel:(617)626-2350)

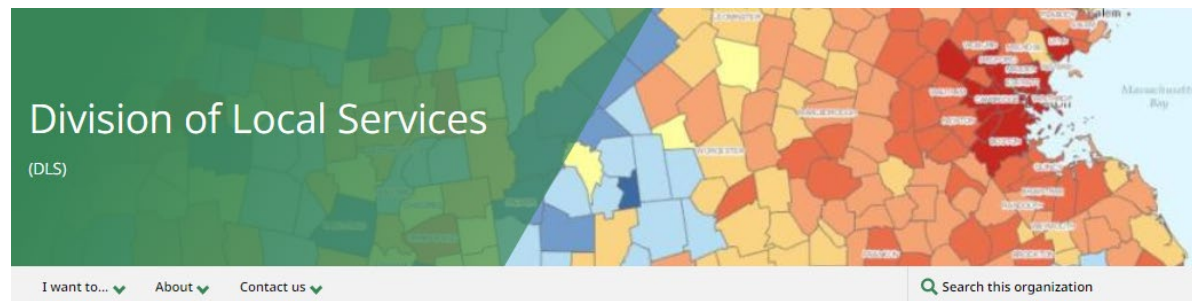
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Please email us for the fastest response.

To contact the Bureau of Accounts, consult our staff directory:

<https://www.mass.gov/guides/dls-staff-directory>



DLS promotes sound municipal finance management practices and supports local officials by providing guidance, training and oversight.

www.mass.gov/dls



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