

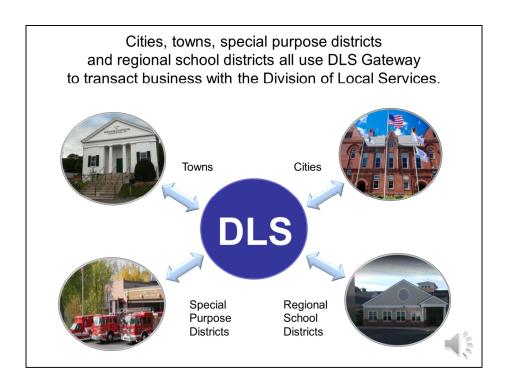


Welcome to DLS Gateway!

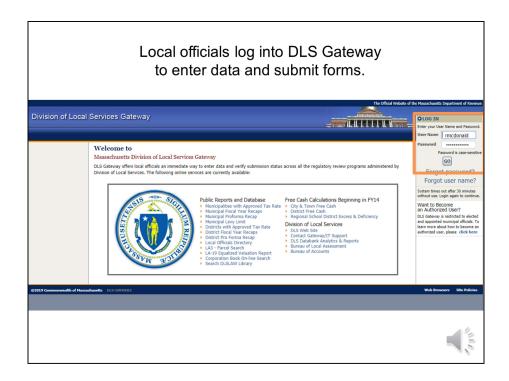
This presentation will introduce you to the Division of Local Services' Gateway application.



What is DLS Gateway? DLS Gateway is a Web-based application suite used by local government officials and the Division of Local Services.



Cities, towns, special purpose districts and regional school districts all use DLS Gateway to transact business with the Division of Local Services.



Local officials log into DLS Gateway to enter data and submit forms.





Not all local officials need a DLS Gateway account.

Officials in these positions do need an account:

- Assessor
- · Accountant or Accountant/Auditor
 - Treasurer
- Collector or Treasurer/Collector
 - Mayor
- Members of the Selectboard or City Council
 - City or Town Clerk



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Accountant or Accountant/Auditor

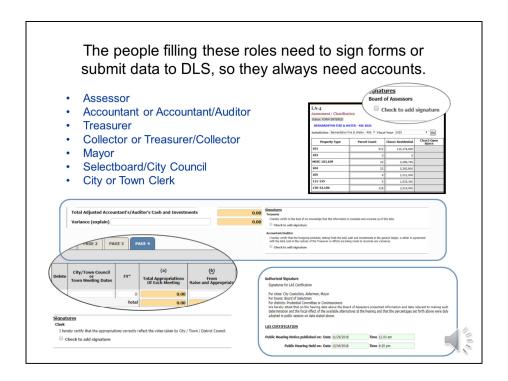
Treasurer

Collector

Mayor

Members of the Selectboard or City Council

City or Town Clerk



The people filling these roles need to sign forms or submit data to DLS, so they always need accounts.

Local officials who don't need to submit or sign forms sometimes have DLS Gateway accounts for specific business needs.



For example, IT Directors and staff often have Gateway accounts, so they can create and maintain local accounts without DLS assistance.

Town Managers and Town Administrators often have accounts to monitor important processes like setting the tax rate, determining free cash and submitting the Schedule A report.

Not sure if you need an account?

Contact DLS Gateway Support
(617) 626-2350 or DLSGateway@dor.state.ma.us



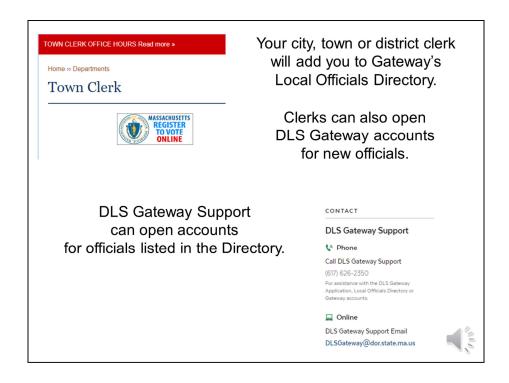
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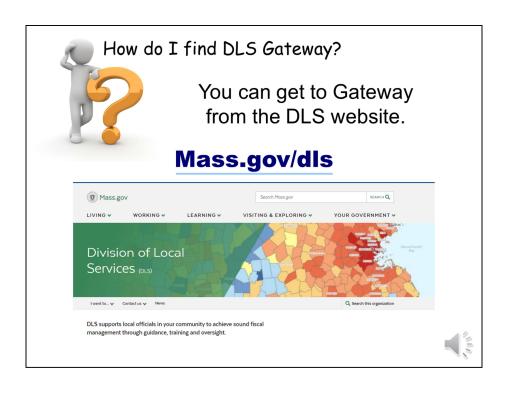
To obtain an account, the first step is to be listed as a local official in Gateway's Local Officials Directory. The Directory is DLS's source for verifying that a person works for a specific jurisdiction.



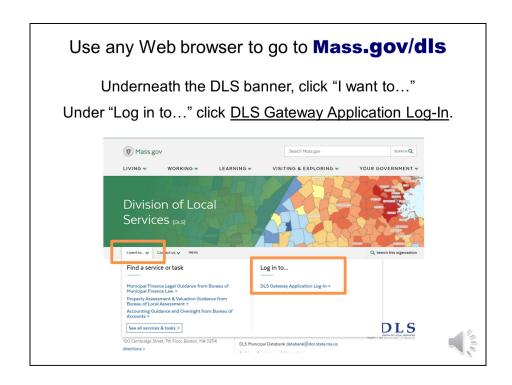
Your city, town or district clerk will add you to Gateway's Local Officials Directory.

Clerks can also open DLS Gateway accounts for new officials.

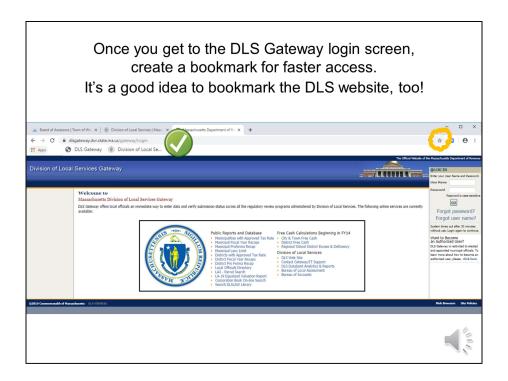
DLS Gateway Support can open accounts for officials listed in the Directory.



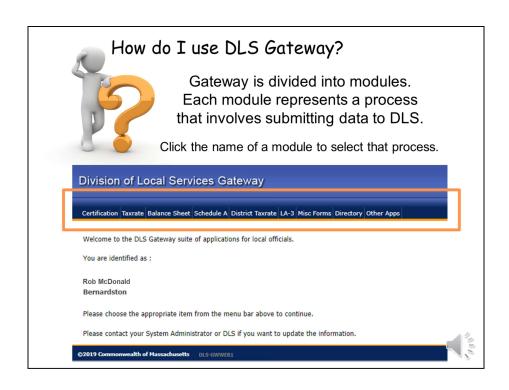
You can find Gateway by going first to the DLS website.



Using any Web browser, go to mass.gov/dls. Underneath the DLS banner, click "I want to," then under "Log in to..." click the link for <u>DLS Gateway Application Log-In</u>.



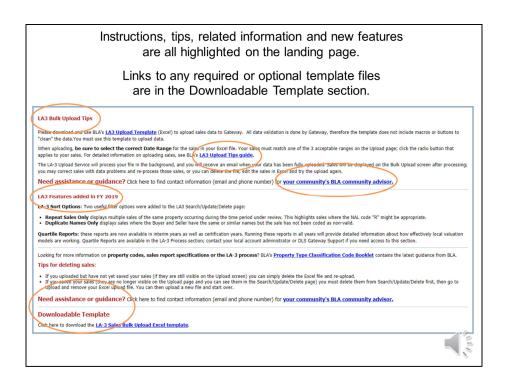
Once you get to the DLS Gateway login screen, create a bookmark in your web browser for faster access. It's a good idea to bookmark the DLS website, too!



Gateway is divided into modules. Each module represents a process that involves submitting data to DLS. Click the name of a module to select that process.

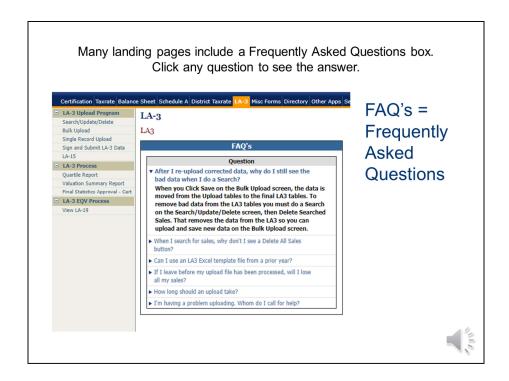


After selecting a module, the first screen you see is the **Landing Page**.

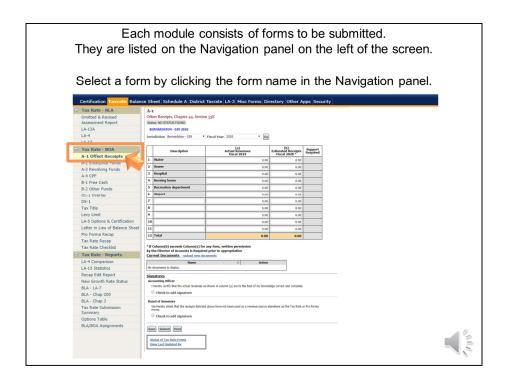


Instructions, tips, related information and new features are all highlighted on the landing page.

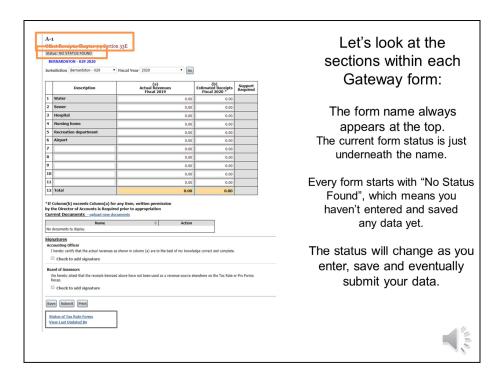
Links to any required or optional template files are in the Downloadable Template section.



Many landing pages include a Frequently Asked Questions box. Click any question to see the answer.



Each module consists of forms to be submitted. They are listed on the Navigation panel on the left of the screen. Select a form by clicking the form name in the Navigation panel.



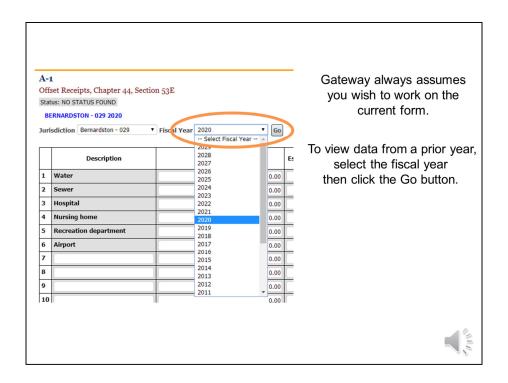
Let's look at the sections within each Gateway form:

The form name always appears at the top.

The current form status is just underneath the name.

Every form starts with "No Status Found", which means you haven't entered and saved any data yet.

The status will change as you enter, save and eventually submit your data.

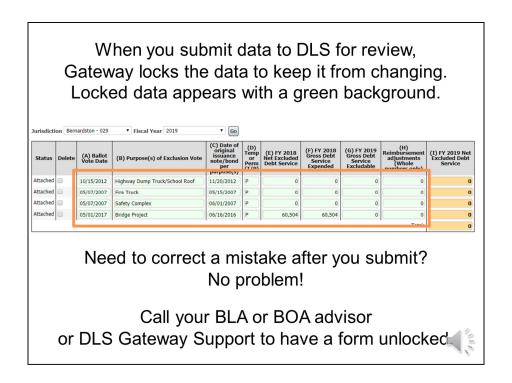


Gateway always assumes you wish to work on the current form.

To view data from a prior year, select the fiscal year then click the Go button.

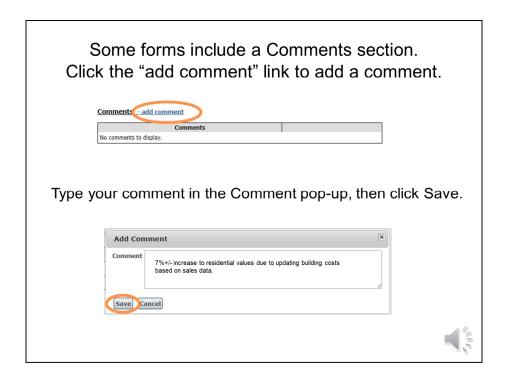
Data can be entered in any field with a white background. Data fields with an orange background are calculated automatically or come from another form, so they cannot be changed.	
Cash Reconciliation Report	
Cash Reconciliation Report	
Status: NO STATUS FOUND BERNARDSTON - 029 2019	
Jurisdiction Bernardston - 029 ▼ Fiscal Year 2019	9 🔻 😡
Total Treasurer's Cash and Investments (6/30 year-end report)	0.00
Other trust funds not in custody of Treasurer	0.00 Enter data here
Total Cash and Investments	0.00
Accountant's/Auditor's Cash and Investments (PER BALANCE SHEET)	
General Fund	0.00
Special Revenue Funds	0.00 And here
Capital Projects Funds	0.00
Enterprise Funds Trust and Agency Funds	0.00
Total per general ledger	0.00
Total per general leuger	0.00

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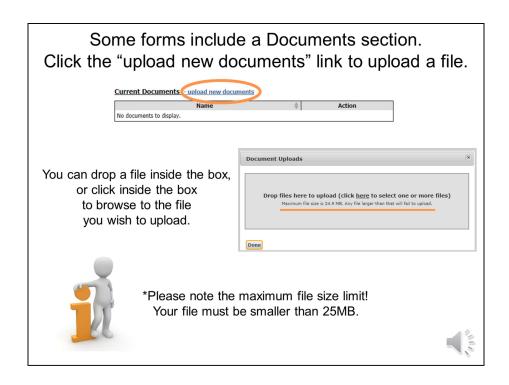


When you submit data to DLS for review, Gateway locks the data to keep it from changing. Locked data appears with a green background.

Need to correct a mistake after you submit? No problem! Call your BLA or BOA advisor or DLS Gateway Support to have a form unlocked



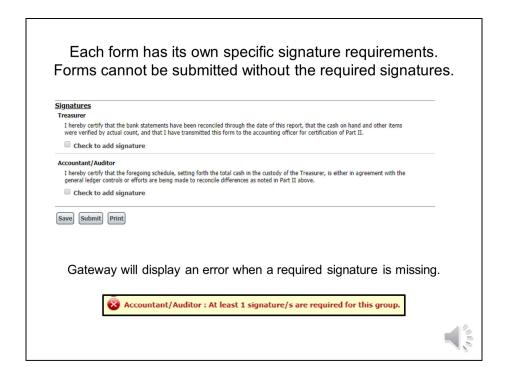
Some forms include a Comments section. Click the "add comment" link to add a comment. Type your comment in the Comment pop-up, then click Save.



Some forms include a Documents section. Click the "upload new documents" link to upload a file.

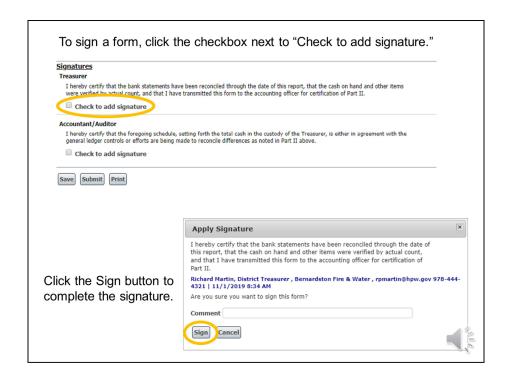
You can drop a file inside the box, or click inside the box to browse to the file you wish to upload.

Please note the maximum file size limit for Gateway uploads: files must be smaller than 25MB.



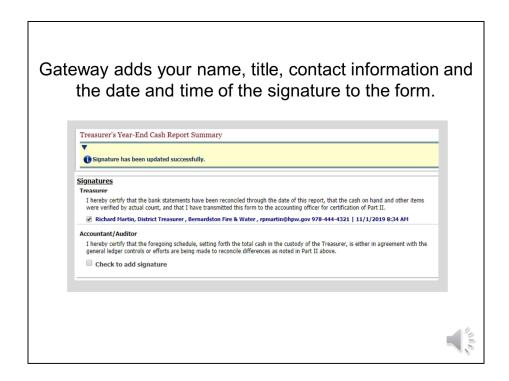
Each form has its own specific signature requirements. Forms cannot be submitted without the required signatures.

Gateway will display an error when a required signature is missing.



To sign a form, click the checkbox next to "Check to add signature."

Click the Sign button to complete the signature.

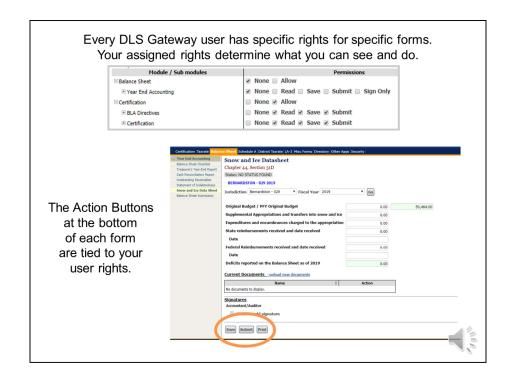


Gateway adds your name, title, contact information and the date and time of the signature to the form.



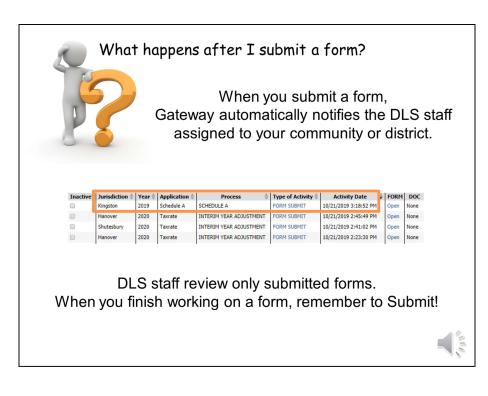
To remove a signature, click the checkbox next to your signature,

Then click the Remove button.



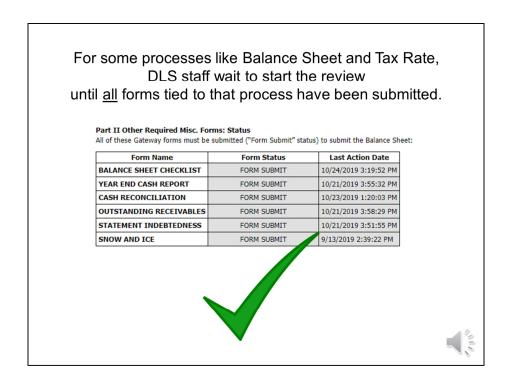
Every DLS Gateway user has specific rights for specific forms. Your assigned rights determine what you can see and do.

The Action Buttons at the bottom of each form are tied to your user rights.

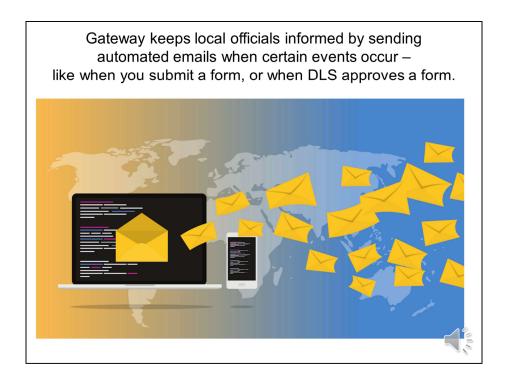


What happens after I submit a form? When you submit a form, Gateway automatically notifies the DLS staff assigned to your community or district.

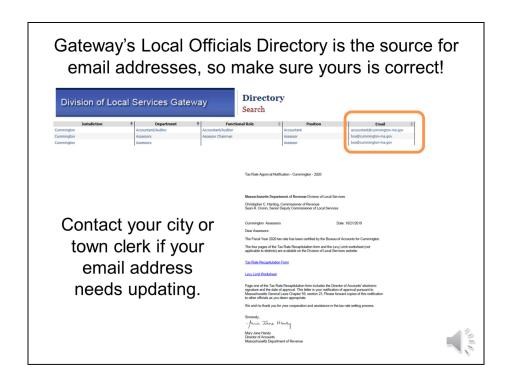
DLS staff review only submitted forms. When you finish working on a form, remember to Submit!



For some processes like Balance Sheet and Tax Rate, DLS staff wait to start the review until all forms tied to that process have been submitted.

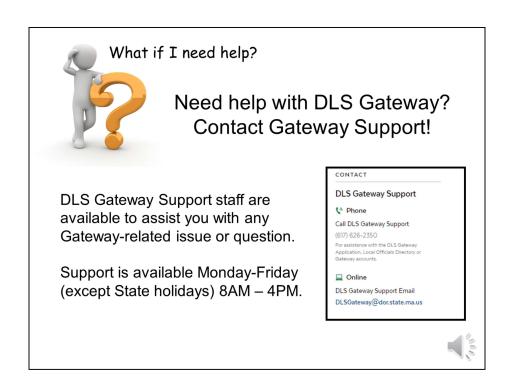


Gateway keeps local officials informed by sending automated emails when certain events occur – like when you submit a form, or when DLS approves a form.



Gateway's Local Officials Directory is the source for email addresses, so make sure yours is correct!

Contact your city or town clerk if your email address needs updating.



Need help with DLS Gateway? Contact Gateway Support!

DLS Gateway Support staff are available to assist you with any Gateway-related issue or question.

Support is available Monday through Friday (except State holidays) from 8AM to 4PM.



For more information about DLS Gateway, contact Gateway Support or your BLA or BOA Community Advisor. And be sure to visit our website at mass.gov/dls.